

Quicken for Mac 2018-2020 Conversion Instructions

Web Connect

Introduction

As **Eastern Bank** completes its business online banking conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data.

To complete these instructions, you will need your login credentials for business online banking.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

NOTE: If you are using the Direct Connect service and were provided with unique 2-part login credentials these instructions do not apply and no action is required. If you are unsure which service you are using please call us at 1-800-333-8000.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select **Backing up data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select “Check for Updates,” and follow the instructions.

Task 2: Connect Accounts at **Eastern Bank Business Online**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.

3. Select Set up transaction download.
4. Enter **Eastern Bank Business Online** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Log in to Eastern Treasury™ or Eastern Business Banking™ at <https://business.easternbank.com/ui/> . **Download** a file of your transactions to your computer.

NOTE: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

NOTE: Select “Web Connect” for the “Connection Type” if prompted.

7. In the “**Accounts Found**” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select “**Link**” to pick your existing account.

IMPORTANT: Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.

8. Click **Finish**.
9. Repeat steps for each account to be connected.

Thank you for making these important changes!