

Quicken for Windows 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 > **Quicken Help**. Search for **Back Up** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for **Update Software** and follow the instructions.

Task 2: Deactivate Account(s) at Eastern Bank

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.

5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps for each account you want to deactivate.

Task 3: Re-activate Accounts at Eastern Bank

1. Log in to Eastern Treasury™ or Eastern Business Banking™ at <https://business.easternbank.com/ui/> and download your Quicken Web Connect file.
2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.

NOTE: Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT: Do NOT select create a new account unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download** into Quicken or click the **Cancel** button.

4. Repeat steps for each account you want to reactivate in Quicken.

Thank you for making these important changes!