

Quicken for Mac Update Instructions

Web Connect and Express Web Connect

Introduction

As **Enterprise Bank** completes an update with Quicken, you may need to modify your Quicken settings to ensure the smooth connection of your accounts.

To complete these instructions, you will need your login credentials for online banking. Perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This update should take no more than 15 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Upgrade 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.
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Task 2: Confirm Connectivity After Update – ***Any time starting on 05/11/2021***

For Express Web Connect Users

1. Attempt to perform a **One Step Update** and import new transactions.
2. If you receive an error, proceed to Task 3.
3. If you do not receive an error, no further action is required.

For Web Connect Users

1. Attempt to import new transactions using a Web Connect file.
 2. If you receive an error, proceed to Task 3.
 3. If you do not receive an error, no further action is required.
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Task 3: Disconnect Accounts in Quicken

For Express Web Connect and Web Connect Users unable to update transactions in Quicken, perform the following steps:

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting** > **Deactivate Downloads**.
4. Repeat steps for each account to be disconnected.

Task 4: Reconnect Accounts to *Enterprise Bank – MA - Personal*

For Express Web Connect Users

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 *Enterprise Bank – MA – Personal* in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User Id** and **Password** and click **Continue**.
If the bank requires extra information, enter it to continue.
NOTE: Select “Express Web Connect” or “Quicken Connect” for the “Connection Type” if prompted.
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.

6. Select **Finish**.

For Web Connect Users

1. Select your account under the **Accounts** list on the left side.
1. Choose **Accounts** menu > **Settings**.
2. Select Set up transaction download.
3. Enter *Enterprise Bank – MA – Personal* in the **Search** field, select the name in the **Results** list and click **Continue**.
Log in to <https://www.enterprisebanking.com/> **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.

4. Drag and drop the downloaded file into the box Drop download file.
5. Select “Web Connect” for the “Connection Type” if prompted.
6. 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.

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