

## Quicken for Windows 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

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#### Task 1: Upgrade Preparation

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up Your Data** and follow the instructions.
  2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Update Software** and follow the instructions.
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#### Task 2: Confirm Connectivity After Update – ***Any time starting on 05/11/2021***

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##### 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

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

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 to be disconnected.

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

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### For Express Web Connect Users

1. Choose **Tools** menu > **Account List**.
1. Click the **Edit** button of the account you want to activate.
2. In the **Account Details** dialog, click the **Online Services** tab.
3. Click **Set up Now**.
4. Use **Advanced Setup** to activate your account.
5. Enter *Enterprise Bank – MA – Personal* in the search field, select the name in the list and click **Next**.
6. If presented with the Select Connection Method screen, select **Express Web Connect**.  
Enter your **User ID** and **Password**. Click **Connect**.

NOTE: You may be presented with a security question from your Enterprise Bank prior to receiving your accounts.

Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

**IMPORTANT:** Do **NOT** select **Add to Quicken** 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**.

7. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
8. Click **Done** or **Finish**.

### For Web Connect Users

Download your Quicken Web Connect file from <https://www.enterprisebanking.com/>

1. Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.
2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.

IMPORTANT: 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. **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.

3. Repeat steps for each account to be reconnected.