



Where Each Relationship Matters®

Welcome to Rockland Trust.

As East Boston Savings Bank completes its system conversion to Rockland Trust, you will need to take action to ensure the smooth transition of your data. Please reference the guides below when transferring over your data.

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Quicken for Windows Conversion Instructions



Where Each Relationship Matters®

Web Connect

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

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 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.

Task 2: Connect to **East Boston Savings Bank** for a final download before the end of day on **November 12, 2021**

1. Download your Quicken Web Connect file from www.ebsb.com.
2. Click **File** > **File Import** > **Web Connect File**. Locate and select the Web Connect file to import.
3. Repeat the download process for each account you have (such as checking, savings, credit cards, and brokerage).
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE: If you need assistance matching transactions, choose **Help** menu > **Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3:

Disconnect Accounts at **East Boston Savings Bank** on or after **November 12, 2021**

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.

Task 4: Reconnect Accounts to **Rockland Trust** on or after **November 15, 2021**

1. Download your Quicken Web Connect file from RocklandTrust.com.

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.

2. Click **File > File Import > Web Connect File**. Locate and select the Web Connect file to import.
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.

NOTE: 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 to be reconnected.

Quicken for Mac Conversion Instructions



Where Each Relationship Matters®

Web Connect

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: On the first Action Date

1. Backup your Quicken Mac data file and update the application.
2. Choose **File > Save a Backup**.
3. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
4. Complete a final transaction download.
5. Complete last transaction update before the change to get your transaction history up to date.
6. Repeat this step for each account you need to update.
7. Accept all new transactions into the appropriate registers.

Task 2: On the second Action Date

1. Activate online banking connection for accounts connected to financial institution that is requesting this change.
2. Select your account under the **Accounts** list on the left side.
3. Choose **Accounts > Settings**.
4. Select **Set up transaction download**.

5. Enter your financial institution name in the search field, select the correct option and click **Continue**.
6. Log into your financial institution's online banking site and download your transactions to your computer.
7. 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.
8. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted.
9. In the **Accounts Found** screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, click **Link** to pick your existing account.
10. Do NOT select **ADD** in the **Action** column unless you intend to add a new account to Quicken.
11. Click **Finish**.

QuickBooks for Windows Conversion Instructions



Where Each Relationship Matters®

Web Connect

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your QuickBooks settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

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

NOTE: If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as online banking cannot be performed in multi-user mode because of the way the activities interact with a company data file.

3. Switch to single user mode. For instructions to switch to single user mode, choose **Help** menu > **QuickBooks Help**. Search for “Switch to Single User Mode” and follow the instructions.

NOTE: If you are not using Classic Mode (Register Mode), you will need to enable it for the conversion. You can change it back after the conversion is complete.

4. Enable Classic Mode (Register Mode).
5. For instructions to enable Classic Mode (Register Mode), choose **Help** menu > **QuickBooks Help**. Search for “Banking Feed Modes” select **Bank Feeds Modes overview**, scroll down, and follow the instructions.

Task 2: Connect to **East Boston Savings Bank** for a final download before the end of day on **November 12, 2021**

1. Log in to www.ebsb.com and download your QuickBooks Web Connect file.
2. Click **File > Utilities > Import > Web Connect Files**.
3. Link your bank account with the existing QuickBooks account and click **Continue**.
4. Repeat steps for each account.

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose **Help menu > QuickBooks Help**. Search for **"Matching Transactions"** and follow the instructions.

NOTE: All transactions must be matched or added to the register prior to disconnecting your accounts.

Task 4: Disconnect Accounts at **East Boston Savings Bank** on or after **November 12, 2021**

1. Choose the **Lists** menu > **Chart of Accounts**.
2. Select the account you want to deactivate.
3. Click **Edit** menu > **Edit Account**.
4. Click on the **Bank Feed Settings** tab in the **Edit Account** window.
5. Select **Deactivate All Online Services** and click **Save & Close**.
6. Click **OK** for any dialog boxes that may appear with the deactivation.
7. Repeat steps for each account to be disconnected.

Task 5: Reconnect Accounts to **Rockland Trust** on or after **November 15, 2021**

1. Log in to RocklandTrust.com and download your QuickBooks Web Connect file.
2. Click **File > Utilities > Import > Web Connect Files**.

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. If prompted for connectivity type, select **Web Connect**.

4. Click the **Import new transactions now** button, then click **OK**.

NOTE: If you previously removed the check from the “Always give me the option of saving to a file...” option, then this dialog will not display.

5. In the “**Select Bank Account**” dialog, click **Use an existing QuickBooks** account.
6. In the corresponding drop-down list, select your QuickBooks account, and click **Continue**.
7. Confirm the prompt by clicking **OK**.
8. Repeat steps for each account to be reconnected.

IMPORTANT: Verify that all transactions downloaded successfully into your account registers.

Task 6: Re-enable Express Mode (if necessary)

NOTE: If you prefer Classic Mode (Register Mode), you are finished with your conversion. If you use Express Mode for online banking, you may now re-enable the mode.

For instructions to enable Express Mode, choose **Help > QuickBooks Help**. Search for “Banking Feed Modes” then select **Bank Feed Modes overview**, and follow the instructions.

QuickBooks for Mac Conversion Instructions



Where Each Relationship Matters®

Web Connect

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your QuickBooks settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose the **Help** menu and search for "Back Up" and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help** menu and search for "Update QuickBooks" then select **Check for QuickBooks Updates** and follow the instructions.

Task 2: Connect to **East Boston Savings Bank** for a final download before the end of day on **November 12, 2021**

1. Log in to www.ebsb.com and download your QuickBooks Web Connect File.
2. Click **File > Import > From Web Connect**.
3. Link your bank account with the existing QuickBooks account and click **Continue**.
4. Repeat steps for each account.

Task 3: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose the **Help** menu and search for “Updating Your Register” select the article **Updating Your Register** and follow the instructions.

NOTE: Transactions must be matched or added to the register prior to disconnecting accounts.

Task 4: Disconnect Accounts at East Boston Savings Bank on or after November 12, 2021

1. Choose **Lists** menu > **Chart of Accounts**.
2. Select the account you want to deactivate.
3. Choose **Edit** menu > **Edit Account**.
4. In the “**Edit Account**” window, click the **Online Settings** button.
5. In the “Online Account Information” window, choose **Not Enabled** from the “**Download Transaction**” list and click **Save**.
6. Click **OK** for any dialog boxes that may appear with the deactivation.
7. Repeat steps for each account to be disconnected.

Task 5: Reconnect Accounts to Rockland Trust on or after November 15, 2021

1. Log in to RocklandTrust.com and download your QuickBooks Web Connect File.

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.

2. Click **File** > **Import** > **From Web Connect**.
3. If prompted for connectivity type, select **Web Connect**.
4. The “Account Association” window displays during setup. For each account you wish to download into QuickBooks, click **Select an Account** to choose the appropriate existing account register.

IMPORTANT: Do **NOT** select “New” under the action column.

5. Click **Continue**.
6. Click **OK** to any informational prompts.
7. Add or match all downloaded transactions in the “**Downloaded Transactions**” window.
8. Repeat steps for each account to be reconnected.

Quicken for Windows Conversion Instructions



Where Each Relationship Matters®

Express Web Connect

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

NOTE: **Express Web Connect** uses the same User ID and Password as your financial institution's website.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

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 "Backup Data File" 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: Connect to **East Boston Savings Bank** for a final download before the end of day on **November 12, 2021**

1. Choose **Tools** menu > **One Step Update**.
2. Depending on how you manage passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the "One Step Update Settings" box.
3. In the "One Step Update Settings" box, make sure all items are checked and click **Update Now**.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE: If you need assistance matching transactions, choose **Help** menu > **Quicken Help**. Search for "Matching Transactions" and follow the instructions.

Task 3: Disconnect Accounts at East Boston Savings Bank on or after November 12, 2021

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the “Account Details” window, 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.

Task 4: Reconnect Accounts to Rockland Trust on or after November 15, 2021

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

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

9. 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**.

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

Quicken for Mac Conversion Instructions



Where Each Relationship Matters®

Express Web Connect

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

NOTE: Quicken Express Web Connect uses the same User ID and Password as your financial institution's website.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

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 to **East Boston Savings Bank** for a final download before the end of day on **November 12, 2021**

1. Select your account under the "Accounts" list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat the download process for each account you have (such as checking, savings, credit cards, and brokerage).

Task 3: Disconnect Accounts at **East Boston Savings Bank** on or after **November 12, 2021**

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 **Rockland Trust** on or after **November 15, 2021**

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 “Rockland Trust” in the search field, select the name in the “Results” list and click **Continue**.
5. Enter your **User ID** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select **Express Web Connect** or **Quicken Connect** for the “Connection Type” if prompted.

7. In the “Accounts Found” window, 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.

8. Select **Finish**.

QuickBooks Online Edition Conversion Instructions



Where Each Relationship Matters®

QuickBooks Online Edition

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your QuickBooks Online Edition settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

Documentation and Procedures

Conversion – Information only

QuickBooks Online data is stored on Intuit servers in the cloud. Since we update your records with every change, we cannot restore your file to a previous point in time.

QuickBooks Online automatically updates your selected version so you are always on the latest release.

NOTE: QuickBooks Online edition connectivity services may be interrupted up to three to five business days after the conversion is complete.

Task 1: Connect to **East Boston Savings Bank** for a final download before the end of day on **November 12, 2021**

NOTE: Please skip to page 4 if you manually import transactions.

1. Choose **Transactions > Banking**.
2. In the upper right corner, click **Add Account**.
3. Enter **East Boston Savings Bank > Find > Click the link for East Boston Savings Bank**.
4. Type your **User ID** and **Password** and click **Log In**.
5. If the bank requires extra information, enter it to continue.
6. Choose an account type for each account you're connecting.

7. Click **Connect** to download up to 90 days of transactions.

NOTE: If you need a shorter date range, click **Need a shorter date range?** at the top and choose between 0, 7, or 30 days.

8. After your download finishes, click the **New Transactions** tab to see what was downloaded.

Task 2: Match Downloaded Transactions

1. If new transactions were received from your connection, accept all new transactions on the **Transactions > Banking** page. Simply check off all the New/Matched transactions and click **Batch Action** to "Accept Selected".
2. If you need assistance matching transactions, choose **Help menu > Search** for "Matching Transactions" and follow the instructions.

Task 3: Deactivate Accounts at East Boston Savings Bank on or after November 12, 2021

1. Choose **Transactions > Banking**.
2. Click on the account you'd like to disconnect, then click the **Pencil Icon**.
3. Click on **Edit Account Info**.
4. Check the box next to "Disconnect this account on save" > Click **Save**.
5. Repeat steps 2—6 for each account at **East Boston Savings Bank**.

Task 4: Re-activate Accounts at Rockland Trust on or after November 15, 2021

1. Choose **Transactions > Banking**.
2. In the upper right corner, click **Add Account**
3. Enter **Rockland Trust > Find** > Click the link for **Rockland Trust**.
4. Type your **User ID** and **Password**. Click **Log In**.
5. Ensure you associate the account for **Rockland Trust** to the appropriate account already listed under "QuickBooks Accounts". You will want to select the matching accounts in the drop-down menu.

NOTE: Do **NOT** select "add new". If you are presented with accounts you do not want to track in this data file, uncheck the box next to the account name.

6. After all accounts have been matched, click **Connect**.
7. When the download is finished click **I'm done. Let's go!**

Task 5: Excluding Duplicate Transactions

1. Choose **Transactions > Banking**.
2. In the “New Transactions” window, click the boxes for the transactions you want to exclude.
3. Click **Batch Actions > Exclude Selected**.

NOTE: If you accidentally exclude a transaction, you can include it again.

Task 6: Undo Excluded Transactions

1. Choose **Transactions > Banking**.
2. Click the **Excluded** tab.
3. Click the boxes for the transactions you want to include.
4. Click **Batch Actions > Undo**.
5. Transactions will appear again in the “New Transactions” tab for you to work with.

Additional Instructions: Manually Import Transactions

1. Log in to www.ebsb.com
2. Download one of the following Web Connect files.
 - a) .qbo (QuickBooks)
 - b) .qfx (Quicken)
3. In QuickBooks Online, choose **Transactions > Banking**.
4. In the upper right corner, click **File Upload**.
5. Click Browse and select **East Boston Savings Bank** Web Connect file from your computer.
6. Click **Next**.
7. In the drop-down menu, select the account where you'd like to upload the transactions.
8. When the download is finished click **I'm done. Let's go!**
9. After your download finishes, click the “New Transactions” tab to see what was downloaded.

Mint Conversion Information



Where Each Relationship Matters®

Mint.com

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, Mint aggregation services may be interrupted for up to five business days.

NOTE: You will be able to access online banking information by directly logging into your financial institution website during the interrupted time.

Mint Conversion Information

Mint.com data is stored on Intuit cloud servers. Data is updated with every change and cannot restore data to a previous point in time.

For a successful account update, do not login into Mint.com for **Rockland Trust** until five business days after the conversion.

During this time, the Mint.com server will automatically make the system conversion for your activated accounts. If you log in to Mint.com during this time, you may see duplicate accounts or an error.

IMPORTANT: Please do not attempt to change the status or make any changes in Mint.com during this time. After 5 business days, the accounts should reconcile showing your transaction history available.

In the event that your accounts do not display current transactions after five business days, you may log back into Mint.com and click the refresh button to update the accounts. After the download completes, click the **Transactions** tab to view up to 90 days of transaction history.

Quicken for Windows Conversion Instructions



Where Each Relationship Matters®

Express Web Connect to Direct Connect

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

NOTE: Express Web Connect uses the same User ID and Password as the **East Boston Savings Bank** website. Direct Connect for **Rockland Trust** may require registration. Please contact your financial institution to verify your Direct Connect login information.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

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 “Backup Data File” 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: Connect to **East Boston Savings Bank** for a final download before the end of day on **November 12, 2021**

1. Choose **Tools** menu > **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the “One Step Update Settings” box, make sure all items are checked and click **Update Now**.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE: If you need assistance matching transactions, choose **Help** menu > **Quicken Help**. Search for “Matching Transactions” and follow the instructions.

Task 3: Disconnect Accounts at East Boston Savings Bank on or after November 12, 2021

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the “Account Details” window, 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.

Task 4: Reconnect Accounts to Rockland Trust on or after November 15, 2021

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the “Account Details” window, click on the **Online Services** tab.
4. Click **Set up Now**.
5. Use “Advanced Setup” to activate your account.
6. Enter **Rockland Trust** in the search field, select the name in the list and click **Next**.
7. If presented with the “Select Connection Method” screen, select **Direct Connect**.
8. Type your Direct Connect **User ID** and **Password** and click **Connect**.
9. 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 want 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**.

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

Quicken for Mac Conversion Instructions



Where Each Relationship Matters®

Express Web Connect to Direct Connect

Introduction

As **East Boston Savings Bank** completes its system conversion to **Rockland Trust**, you will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your User ID and Password for each Financial Institution.

NOTE: Express Web Connect uses the same User ID and Password as the **East Boston Savings Bank** website. Direct Connect for **Rockland Trust** may require registration. Please contact your financial institution to verify your Direct Connect login information.

You should perform the following instructions as described and in the order presented. If you do not, your online banking connectivity may not function properly. This conversion should take 15–30 minutes.

Thank you for making these important changes!

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 to **East Boston Savings Bank** for a final download before the end of day on **November 12, 2021**

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

Task 3: Disconnect Accounts At **East Boston Savings Bank** on or after **November 12, 2021**

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 deactivated.

Task 4: Reconnect Accounts to **Rockland Trust** on or after **November 15, 2021**

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 **Rockland Trust** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User ID** and **Password** and click **Continue**.
6. If the bank requires extra information, enter the required information to continue.

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

7. In the “Accounts Found” screen, 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. Select **Finish**.