Quicken Conversion Instructions

As part of North Shore Bank's Digital Banking upgrade, you will need to modify your Quicken settings to ensure that your data connectivity transfers smoothly. This document contains instructions for both Windows and Mac, and all three connectivity types (Direct Connect, Express Web Connect or Web Connect).

IMPORTANT: Express Web Connect will not be available until 5 business days after Monday, October 26, so please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect or Direct Connect (if supported)

To navigate this document, just click the link or links below that match your product and connectivity:

Instructions for One-Step Update initiated from within Quicken

Instructions for Downloading a Web Connect file from North Shore Bank Digital Banking

Quicken Windows Direct Connect and Express Web Connect

Before Friday, October 23:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On or after Monday, October 26:

1. Deactivate online banking connection for accounts connected to North Shore Bank.
    a. Choose **Tools > Account List**.
    b. Click **Edit** on the account to deactivate.
    c. In Account Details, click **Online Services**.
    d. Click **Deactivate.** Follow prompts to confirm deactivation.
    e. Click the **General** tab.
    f. Delete Financial Institution and Account Number information. Click **OK** to close window.
    g. Repeat steps for any additional accounts that apply.
2. Reconnect the online banking connection for your accounts.
    a. Choose **Tools > Account List**.
    b. Click **Edit** on the account you want to activate.
    c. In Account Details, click **Online Services** and then choose **Set up Now**.
    d. Type **North Shore Bank WI** in the search field and click **Next**.
    e. Enter your North Shore Bank Digital Banking login credentials.
        - Express Web Connect uses the same login credentials you use for North Shore Bank Digital Banking.
        - Direct Connect might require credentials that do not match your North Shore Bank Digital Banking credentials.

        Important: If your credentials do not work, contact North Shore Bank Customer Support.
    f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

        Important: Do NOT choose "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, choose **Ignore – Don't Download into Quicken** or click **Cancel**.
    g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Direct Connect and Quicken Connect

Before Friday, October 23:

1. Backup Quicken Mac Data File and Update the application.
    a. Choose **File > Save a Backup**.
    b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
    a. Complete last transaction update before the change to get all of your transaction history up to date.
    b. Accept all new transactions into the appropriate registers.

On or after Monday, October 26:

Activate the online banking connection for accounts connected to North Shore Bank.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. In the search field, enter **North Shore Bank WI DC** for Direct Connect or **North Shore Bank WI** for Connect and click **Continue**.
5. Enter your North Shore Bank login credentials.
    - Express Web Connect uses the same credentials you use to login to North Shore Bank Digital Banking.
    - Direct Connect might require credentials that do not match your Digital Banking credentials.

    Important: If your credentials do not work, contact North Shore Bank Customer Support.
6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account. **Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.**
7. Click **Finish**.

Quicken Windows Web Connect

Before Friday, October 23:

1. Backup Quicken Windows Data File and Update.
    a. Choose **File > Backup and Restore > Backup Quicken File**.
    b. Download the latest Quicken Update. Choose **Help > Check for Updates**.
2. Complete a final transaction download.
    a. Complete last transaction update before the change to get all of your transaction history up to date.
    b. Repeat this step for each account you need to update.
    c. Accept all new transactions into the appropriate registers.

On or after Monday, October 26:

1. Deactivate online banking connection for accounts connected to North Shore Bank.
    a. Choose **Tools > Account List**.
    b. Click **Edit** on the account to deactivate.
    c. In Account Details, click **Online Services**.
    d. Click **Deactivate**. Follow prompts to confirm deactivation.
    e. Click the **General** tab.
    f. Delete Financial Institution and Account Number information.
    g. Click **OK** to close window.
    h. Repeat steps for any additional accounts.
2. Reconnect online banking connection for accounts that apply.
    a. Download a Quicken Web Connect file from North Shore Bank Digital Banking.
    b. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
    c. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
    d. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
    e. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

Before Friday, October 23:

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

On or after Monday, October 26:

Activate online banking connection for accounts connected to North Shore Bank.

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter **North Shore Bank WI** in the search field, select the correct option and click **Continue**.
5. Log into North Shore Bank Digital Banking and download your transactions to your computer. **Important: 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 titled **Drop download file**. Choose **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, click **Link** to pick your existing account.
   Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.