



**NORTH COUNTRY
SAVINGS BANK**

Quicken for Mac 2007 Conversion Instructions

Direct Connect

Introduction

As **North Country Savings Bank** completes its EagleNET Online Banking bill payment upgrade, 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.

You will need to disconnect your accounts from **North Country Savings Bank - New** and connect them to **North Country Savings Bank**. To complete these instructions, you will need your EagleNET Online Banking User ID and Password.

You should 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 conversion should take 15–30 minutes.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Conversion Preparation

1. Back up 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 **North Country Savings Bank - New** for a final download before **August 21, 2017**

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 that you use for online banking.

Task 3: Disconnect Accounts at *North Country Savings - New* on or after **August 21, 2017**

1. Choose **Lists** menu > **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. Write down your account information (account number, routing number, and customer ID).

NOTE: You will need this information to re-enable your account.

4. If you use online payment services, then select **Not Enabled** in the **Pay Bills Online** drop-down list. Follow the prompts to confirm the deactivation.
5. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
6. Remove the information within the **Account Number** and **Routing Number** fields.
7. Click **OK** to save your edits.
8. Repeat steps for each account to be disconnected.
9. Verify your account list does not display a blue online circle icon for any accounts at *North Country Savings Bank - New*.

Task 4: Reconnect Accounts to *North Country Savings Bank* on or after **August 21, 2017**

1. Choose **Lists** menu > **Accounts**.
2. Select your first disabled account and click **Edit**.
3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.
4. Click on **Update List**.
5. In the **Financial Institutions** dialog, enter, then select *North Country Savings Bank* from the list and click **Use**.
6. Enter your Direct Connect **User ID** and **Password**. Click **OK**.
7. In the **Add Online Services** dialog, match your first account to the appropriate account number. Click **OK**.

NOTE: Each account will be displayed below “**Use an existing account.**”

8. Click **OK**.
9. Click **OK** to close the **Edit Register** page.

10. Choose **Lists** menu > **Accounts**. Verify that each account you are reactivating has a blue online circle for online services.