

Instructions for converting from Quicken Web Connect to Express Connect

With the new Riverview Internet Banking system, you can take advantage of the Quicken One Step Update process. You will need to modify your Quicken settings to ensure the smooth transition of your data. These instructions will guide you through;

- Backing up your system
- Deactivating Web Connect
- Downloading information from Internet Banking – which will also update some Quicken settings
- Initiate your first One Step Update

It is important that you perform the following instructions exactly as described and in the order presented..

BACK UP YOUR CURRENT DATA

Choose **File** menu → **Backup**.

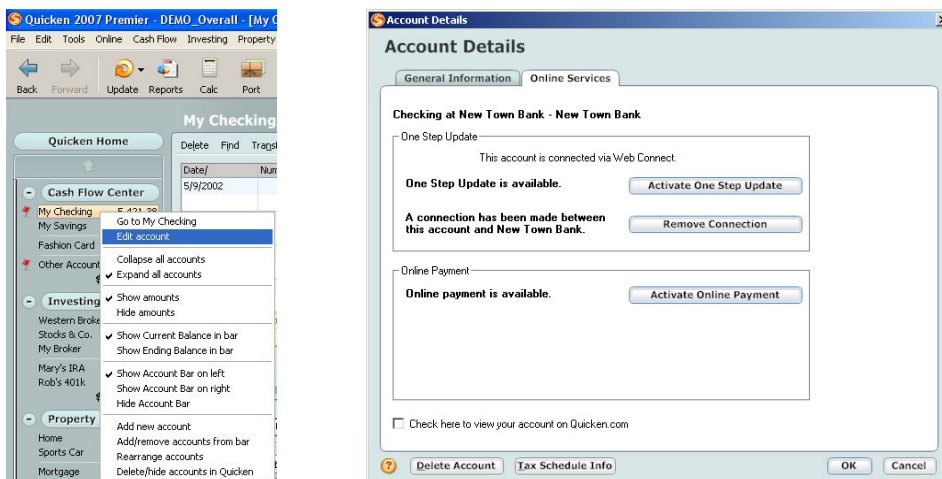
Specify which file to back up and where you want the backup saved in the Quicken Backup dialog, and then click OK.

DE-ACTIVATE YOUR RIVERVIEW ACCOUNTS FROM WEB CONNECT

Right-click your first applicable account from the list.

Select **Edit account** from the pop-up menu.

In the Account Details dialog, click the **Online Services** tab.

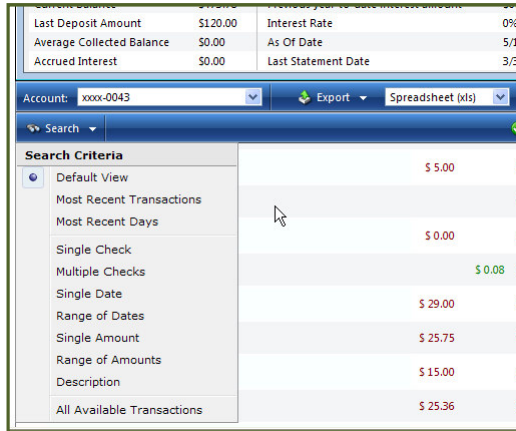


Click **Remove Connection** or **Remove from One Step Update** in the One Step Update area. Confirm the remaining prompts. Do this for all existing Riverview accounts in your Quicken.

INITIAL DOWNLOAD FROM INTERNET BANKING

Open a Web browser and log into Riverview Internet Banking. You will download some transactions into Quicken and this will update your Quicken One Step Update setting. Here's how to do it

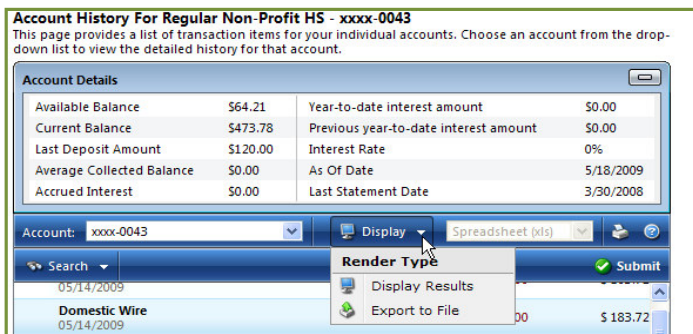
Confirm the last download date in your account register in Quicken. Go into **Internet Banking** and double click on the account.



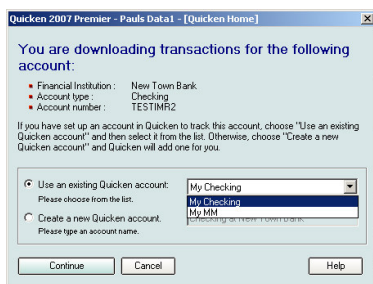
Click on **Search Criteria** and select **Range of Dates**. Select a date range immediately after the last transaction date in Quicken to today.

Click on **Display** and select **Export to File**.

Select **Quicken (qfx)** and Click on **Submit**.



This will initiate the download to Quicken. Click the Use an existing Quicken account radio button. In the corresponding drop-down list, select the correct Quicken account. Once this is complete Quicken will know your Riverview account is setup for Web Connect downloads from Internet Banking.

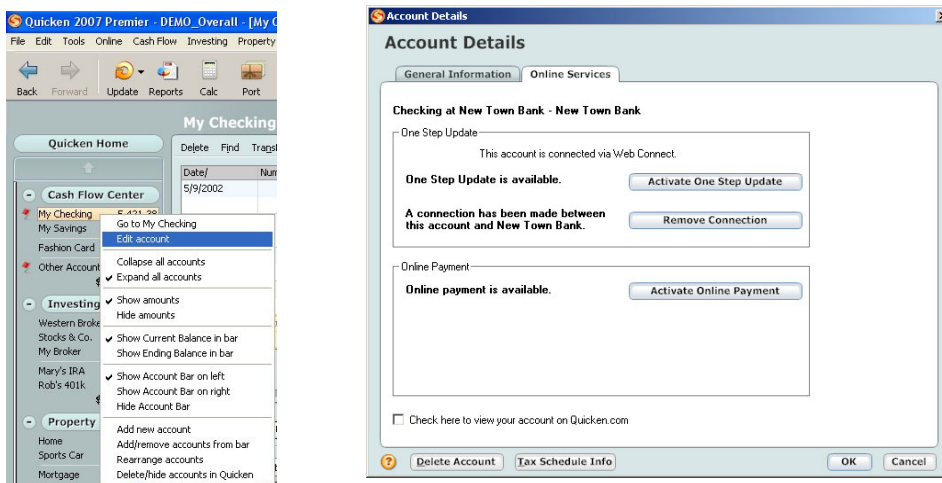



The following step will allow you to enable your account for easier updates.

Back in Quicken – Right-click your first applicable account from the list.

Select **Edit account** from the pop-up menu.

In the Account Details dialog, click the Online Services tab and Click the "**Activate One Step Update**" button and follow the onscreen prompts to complete the One Step Update activation process.



You will be prompted to provide your login credentials and a list of available accounts will be presented. Check any that you want to set up for Express Web Connect. Be sure to match them up with existing accounts within your Quicken. Intuit will log in to the Riverview Internet Banking system daily on your behalf and collect the transactions available. When you want to download them into your Quicken, simply open Quicken and click on the  icon to update transactions or go to Tools > One Step Update or Online > One Step Update in versions 2009 and older.

The first time you do this update, please review the download as there may be duplicates.

If you wish to cancel this process, you will need to Deactivate Express Web Connect, which will delete the login token from Intuit's servers.

Confirm that each of your Riverview accounts has the One Step Update Activated. If so your accounts will be connected using Express Web Connect.

In Quicken 2008-2009 you may need to click on the Activate One Step Update button for EACH Account. In Quicken 2010-2011, you only need to click on the Activate One Step Update button for one account.