Quicken for Windows Conversion Instructions

Quicken for Windows 2013+

Direct Connect

Introduction

Riverview is excited to offer Quicken Direct Connect. You will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your ***User ID and Password*** for ***RiverviewBank.com***.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning 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: Deactivate Your ***Riverview Community Bank*** Accounts on or after ***September 19, 2017***

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you intend to deactivate.

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

4. Click on **Deactivate** and 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 you are deactivating.

8. Backup your data file.

Task 3: Reactivate Your Accounts at ***Riverview Community Bank*** on or after ***September 19, 2017***

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the Account Details dialog, click on the **Online Services tab**.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter ***Riverview Community Bank*** and click **Next**.
7. If presented with the Select Connection Method screen, select **Direct Connect**.
8. Type your ***Riverview*** Online Banking **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**.

Thank you for making these important changes!