

Quicken for Mac 2015-2017 Conversion Instructions



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 the **Riverview Bank** websites.

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.

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: Deactivate Accounts at **Riverview Community Bank**

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 3: Reconnect Accounts to *Riverview Community Bank*

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 ***Riverview Community Bank*** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your ***Riverview*** Online Banking **User Id** and **Password** and click **Continue**.
6. 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.
 - a. After you click **Next**, if you encounter a prompt that states the software could not find “*Riverview Community Bank*” please proceed to step 7 to update your Quicken files or you can wait until Tuesday, September 19 after 8:00 AM (Pacific Time) and the issue will be resolved.
7. To update your Quicken Files click this link, <https://www.quicken.com/support/quicken-2017-windows-release-notes-updates-and-mondo-patch>. Once on the webpage, click “Download the Mondo Patch Update” and follow the Instructions.
 - a. Once you have completed the update please proceed back to Task 3, Step 6.

IMPORTANT: Do **NOT** select “**ADD**” under the action column unless you intend to add a new account to Quicken.

8. Select **Finish**.