Quicken for Windows Conversion Instructions

Quicken for Windows 2012–2015

Direct Connect to Web Connect

As *Virginia Company Bank* completes its system conversion to *EVB,* you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your login credentials for the *Virginia Company Bank* and *EVB* 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.

IMPORTANT:	This update is time sensitive and can be completed on or after *1/26/2015*.

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 Account(s) At Virginia Company Bank

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

2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.

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

4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.

5. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.

NOTE:	The name of the buttons referenced above may vary depending on the services you currently use and the version of Quicken you are using.

6. Click on the **General** or **General Information** tab. Remove the **Account Number**.

7. Remove the name of the **Financial Institution**. Click **OK** to close the window.

8. Repeat steps 2 – 7 for each account at *Virginia Company Bank*.

IMPORTANT:	Customers using One Step Update can follow steps under **Task 4** to reactivate Online Banking via **Express Web Connect.**

Task 3:   Re-activate Your Account(s) at EVB

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1. Log in to *EVB* web site at https://www.bankevb.com.

2. Download and import your transactions to Quicken.

3. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

IMPORTANT:	DO NOT select **Create a new account** or **Create a new Quicken account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

4. Repeat steps 2 – 3 for all of your accounts.

Task 4:   Re-activate Your Account(s) for One Step Updates

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1. Open the account register that you want to enable for online account access.

2. Choose **Account Actions** menu > **Set Up Online**.

3. Enter *EVB* and click **Next**.

4. Type your **User ID** and **Password**. Click **Connect**.

NOTE:	You may be presented with a security question from your Financial Institution prior to receiving your accounts.

5. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** or **Exists in Quicken** and select the matching accounts in the drop-down menu.

IMPORTANT:	Do **NOT** select **New** or **Add In Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

6. After all accounts have been matched, click **Next**.

    You will receive confirmation that your account(s) have been added.

7. Click **Done** or **Finish**.

Thank you for making these important changes!