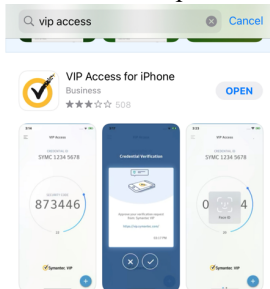


## QuickBooks Work Around

2FA for online banking will need to be Symantec VIP

- Download the Symantec VIP App
  - Go into your App store
  - Search Symantec VIP
  - The App pictured below is the correct App
    - If you are using an iPhone you may need your Apple Password To complete download process



- To change 2FA
  - Log into online banking
  - Click on your name in the Bottom left corner.
  - Select Personal Settings
  - Select Security
  - Two Factor Authentication
    - Edit Settings
  - Remove Primary Method
    - This will close out the online banking session
  - Log Back in
    - Select Symantec VIP as the new 2FA
    - You will need to register your App
      - Credential ID will be in the following format SYMC12345678

When entering the ID on SVB do not enter any spaces

## QuickBooks Connections

- Log into QB
- Hover over Transactions (Left side Panel)
  - Click Bank Transactions
- Verify accounts have been disconnected.
  - Click Arrow Down Next to “Link Account”
  - Select Manage Account
  - Select the Arrow down next to SVB if it still shows connected.
  - If the account is “on” the toggle button will be GREEN, toggle it off.
    - QB will ask if it is ok to deactivate account, select yes.
  - Click “Back to transactions” in the upper left corner.
- Click “Link Account”
  - Enter the new URL <https://accounts.saukvalleybank.com/login>
  - Select SVB and Trust
  - Enter Log in Credentials
  - When QB ask for a code, Enter the Code from the Symantec App
  - Select account and finish the linking process.

\*\*\*Please note, when selecting your account, at the bottom of the screen, you can select the date range for the transactions that will be imported into QuickBooks. If a custom date is not selected QB may default back to the beginning of the year 1/1/2024 \*\*\*