Quicken/Quickbooks Support Tips

1. Currently Centennial Bank is set up with Web Connect functionality with Intuit

- Web Connect does not allow the pay bills feature where bills can be scheduled on the Quicken side and get sent over to the Bank's billpay processor.

2. To change Bank information and continue using with previously entered transactions

- Edit Acct (Right Click on Acct #)
- Deactivate/Delete New One
- Deactivate Old One
- Click General
  - Update Bank Info (Routing #, Acct #, etc.)
- Edit Account, Online Services, Activate One Step Update,
  - Enter Bank Name
    - Centennial Bank-my100bank
  - Enter Internet Banking ID and PW for the ID and PW Quicken asks for
  - If it prompts to answer security questions, these will be the security questions set up on Internet Banking and will need to be the answers that the customer set up on Internet Banking
- Add as existing (Link to existing)
  - Choose Old One

(May have to add transactions to register and then delete the new one. Then go back and add as existing to the old one)

3. To set up Brand New with Quicken

- Pull up Quicken
- Click Tools
- Click Add Account
- Select Account type
- Type in Bank name-Centennial Bank-my100bank
- Enter ID and PW for Centennial Internet Banking
- Quicken will connect with Centennial and download your accounts
- Customer should be able to select which accounts they want to include on Quicken
- If Quicken automatically populates them all, and the customer wants to delete one or more of the accounts it setup, customer can right click on account on left of page and select Edit/Delete Account
- Click Delete
- Type Yes
- Click OK

4. **To download transactions from Internet Banking to Quicken/Quickbooks without using One Step Update**

- **Be sure to not have Quicken/Quickbooks pulled up before starting this process. It will automatically pull up at the time it needs to**
- Sign in to Internet Banking
- Click View Accounts
- Click Download (on right hand side of page)
- Choose In a range of dates
- Always leave Mark as Downloaded box unchecked
- Change File Format to Quicken/Quickbooks
- Change Date Range as desired
- Click Submit
- Summary page of selections made will appear
- Click on the word Quicken or Quickbooks (depending on software customer uses)
- Quicken/ Quickbooks will automatically populate and transactions will be downloaded.