Introduction

Using Quicken for Windows, you can make transfers between the following Centennial Bank account types:

- Checking
- Money Market
- Savings
- Loans (payments to all loan types and draws from credit lines)

Before this is possible, you must have your accounts in Quicken, and they must be synced using the Direct Connect method. If you have not already done so, please find the appropriate guide for instructions on how to establish the Direct Connect service. If the Direct Connect service is already established, please proceed to the steps below.

Please note:

- Money Market accounts will categorize in Quicken as Checking accounts, but you can identify them by account number and/or balance.
- While there are various methods for processing Transfers within Quicken for Windows, we recommend the automated and user friendly method outlined below.
**Steps**

- After launching Quicken, choose an account (1), navigate to the **Actions** menu (2) and select the **Transfer Money** option (3).

- Enter a **Transfer Date** (4), **Amount** (5), **From Account** (6), **To Account** (7) and if desired enter a **Description** and a **Memo** (8). The Description and Memo fields will only appear in Quicken, not within Online Banking. Finally, select **OK** (9).
In order to make this an online transfer that will upload to Centennial Bank, choose **Transfer Online** (10) when prompted.

You will then see the debit and credit entries listed on both account registers, but it has **not** yet been sent to Centennial Bank. This is evident by the transaction status of **Uncleared** (11).
• Next choose the **Update Account** button (12), enter your **Online Banking Password** (13) if prompted, ensure that both **check boxes** (14) are checked to send the transfer to Centennial Bank and finally select **Update Now** (15).
• Ensure that your One Step Update was completed successfully, and then click Close (16).

![One Step Update Summary]

• If you now examine the register for the Transfer From account, you will see the item shows a transaction status of Sent (17). You will continue to see a status of Uncleared on the Transfer To account until (A) the transfer hard posts to your account, and (B) you perform another update within Quicken.

![Transfer Register]

• If all of the steps above are followed without incident, then within a few moments you should see the transfer within Online Banking (18) on both accounts.
- You have now successfully completed a transfer within Quicken for Windows.