Online Banking

Quicken for Mac 2015-2018 Conversion Instructions

Direct Connect

Introduction

You will need to modify your Quicken settings to use Direct Connect. To complete these instructions, you will need your User ID and Password for your online banking with Centennial Bank.

You should perform the following instructions exactly as described and in the order presented. If you do not, your online banking connectivity may stop functioning properly. This upgrade should take 15–30 minutes.

Thank you!

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: Disconnect Accounts - ***Centennial Bank-my100bank.com***

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: Direct Connect Activation

1. Log into Online Banking at https://online.my100bank.com/IB/bankonline
2. Choose **Profile** menu > **Edit Profile**
3. Check the box associated with ***Allow access from Direct Connect services***

Task 4: Reconnect Accounts

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 ***Centennial Bank-my100bank.com*** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

   NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

7. 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.

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

8. Select **Finish**.