

Quicken® Deactivate/Reactivate Instructions

This document contains instructions for both Windows and Mac and all three connectivity types (Direct Connect, Express Web Connect or Web Connect).

During the reactivation process, please select the applicable Bank ID Name from the following:

Bank ID Name	Description
Cadence Bank DC	QuickBooks and Quicken - Direct Connect
Cadence Bank WC	QuickBooks and Quicken - Web Connect
Cadence Bank Credit Card	Quicken - Web Connect - Credit Card

INSTRUCTIONS FOR ONE-STEP UPDATE INITIATED FROM WITHIN QUICKEN

	Step 1: Deactivate	Step 2: Reactivate
Quicken Windows Direct Connect and Express Web Connect	<p>To deactivate your online banking connection, complete the following steps within Quicken:</p> <ol style="list-style-type: none"> 1. Choose Tools > Account List. 2. Click Edit on the account to deactivate. 3. In Account Details, click Online Services. 4. Click Deactivate. Follow prompts to confirm deactivation. 5. Click the General tab. 6. Delete the previous bank and account information. Click OK to close the window. 7. Repeat steps for any additional accounts that apply. 	<p>To reconnect the online banking connection for your accounts, complete the following steps within Quicken:</p> <ol style="list-style-type: none"> 1. Choose Tools > Account List. 2. Click Edit on the account you want to activate. 3. In Account Details, click Online Services and then choose Set up Now. 4. Type Cadence Bank in the search field, select the appropriate Bank ID Name, and click Next. 5. Enter your login credentials. <ul style="list-style-type: none"> • Express Web Connect uses the same credentials you use for your online banking login. • Direct Connect might require credentials that do not match your online banking credentials. 6. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select Link to an existing account and select the matching accounts in the drop-down menu. <p>Important: Do NOT choose “Create a new account” unless you intend to add a new account to Quicken. If you are presented with accounts that you do not want to track in this data file, choose Ignore – Don’t Download into Quicken or click Cancel.</p> 7. After all accounts have been matched, click Next and then Done.
Quicken Mac Direct Connect and Quicken Connect	<i>Not Applicable - Proceed to Reactivation</i>	<p>To reconnect the online banking connection for your accounts, complete the following steps within Quicken:</p> <ol style="list-style-type: none"> 1. Select your account in the Accounts List on the left side. 2. Choose Accounts > Settings. 3. Select Set up transaction download. 4. Type Cadence Bank in the search field, select the appropriate Bank ID Name, and click Continue. 5. Enter your login credentials. <ul style="list-style-type: none"> • Express Web Connect uses the same credentials you use for your online banking login. • Direct Connect might require credentials that do not match your online banking credentials.

		<ol style="list-style-type: none"> 6. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under Action, choose Link to pick your existing account. Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken. 7. Click Finish.
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INSTRUCTIONS FOR DOWNLOADING A WEB CONNECT FILE FROM YOUR ONLINE BANKING SITE

	Step 1: Deactivate	Step 2: Reactivate
Quicken Windows Web Connect	<p>To deactivate your online banking connection, complete the following steps within Quicken:</p> <ol style="list-style-type: none"> 1. Choose Tools > Account List. 2. Click Edit on the account to deactivate. 3. In Account Details, click Online Services. 4. Click Deactivate. Follow prompts to confirm deactivation. 5. Click the General tab. 6. Delete the previous bank and account information. Click OK to close the window. 7. Repeat steps for any additional accounts. 	<p>To reconnect the online banking connection for your accounts, complete the following steps within Quicken:</p> <ol style="list-style-type: none"> 1. Download a Quicken Web Connect file from Online.CadenceBank.com. 2. In Quicken, choose File > File Import > Web Connect (.QFX) File. 3. Use the import dialog to select the Web Connect file you downloaded. An “Import Downloaded Transactions” window opens. 4. Choose Link to an existing account. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken. 5. Repeat this step for each account you have connected.
Quicken Mac Web Connect	<p><i>Not Applicable - Proceed to Reactivation</i></p>	<p>To reconnect the online banking connection for your accounts, complete the following steps within Quicken:</p> <ol style="list-style-type: none"> 1. Select your account under the Accounts List on the left side. 2. Choose Accounts > Settings. 3. Select Set up transaction download. 4. Type Cadence Bank in the search field, select the appropriate Bank ID Name, and click Continue. 5. Log into Cadence Online Banking and download your transactions to your computer. Important: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions. 6. Drag and drop the downloaded file into the box titled Drop download file. Choose Web Connect for the “Connection Type” if prompted 7. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click Link to pick your existing account. Important: Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken. 8. Click Finish.

QUICKEN BILL PAYMENT USERS

IMPORTANT: If you currently use Direct Connect in Quicken to initiate Bill Payments, please complete the additional tasks at the link below. If you do not use Direct Connect Bill Pay or you only initiate Bill Payments from within your online banking site, these additional tasks are not required.

Quicken Windows Bill Pay

Only complete these tasks if you currently initiate Bill Payments from within Quicken Windows.

IMPORTANT: These tasks must be completed to avoid possible duplicate payments.

Cancel Existing Bill Payments:

1. Choose **Tools > Online Center**.
2. Choose the appropriate Cadence Bank ID Name from the Financial Institution drop-down list.
3. On the **Payments** tab, choose an account from which a payment is scheduled in the future.
4. In the payments status list, you will cancel payments for each payee with a status that is scheduled for delivery on a date after the deadline. To do this, select the first payee and click **Cancel Payment**.
5. Repeat steps 3 & 4 for all payments that are scheduled for delivery after the deadline.
6. On the toolbar, click **Repeating**.
7. Choose a payment instruction and click **Delete**. Click **Delete** again in the confirmation window.
8. Repeat step 7 for each repeating payment you have with your financial institution.

Re-create Your Bill Payments.

If you need help re-creating payments, choose **Help > Quicken Help**. Search for Create an online Payment and follow the instructions to create and transmit an online payment.

Quicken Mac Bill Pay

Only complete these tasks if you currently initiate Direct Connect Bill Payments from within Quicken Mac.

IMPORTANT: These tasks must be completed to avoid possible duplicate payments.

Cancel Existing Bill Payments:

1. Highlight a Bill Payment transaction on the account register.
2. While on the account register, choose **File > Print** to save your list of pending payments. You can use this when you re-create the bill payments and send these payments again.
3. Click **Edit** at the bottom of the account register window.
4. Click **Edit** Details below the highlighted transaction.
5. Click the **Online Payment** tab and choose **Cancel Payment**.
6. Repeat these steps for each outstanding Bill Payment you have scheduled.

Re-create Your Bill Payments.

For assistance with re-creating payments, choose **Help** and search for Adding online Bill Pay transactions. Follow the instructions to create and transmit an online payment.

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