

Quicken® Direct Connect

Getting Started Guide

Downloading a Quicken Format File from Cadence Online Banking

1. From within Cadence Online Banking, select **Accounts > Quicken/QuickBooks Download** from the menu bar.
2. Choose the **Account** for which you want to download the activity followed by the **Start Date** and **End Date** for the applicable time period.
3. Select the **Download Format** and click **Download**.
4. Follow the directions below based on your software type.

Quicken Windows Direct Connect and Express Web Connect

To connect or reconnect your Quicken service with Cadence Online Banking, complete the following steps within Quicken:

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 DC** in the search field, select the appropriate Bank ID Name, and click **Next**.
5. Enter your login credentials.
 - 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 “**Create a new account**” to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don’t Download into Quicken** or click **Cancel**.
7. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Direct Connect and Quicken Connect

To connect or reconnect your Quicken service with Cadence Online Banking, complete the following steps within Quicken:

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 DC** in the search field, select the appropriate Bank ID Name, and click **Continue**.
5. Enter your login credentials.
 - 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. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under Action, select **ADD** to add a new account to Quicken.
7. Follow any remaining prompts and click **Finish**.

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