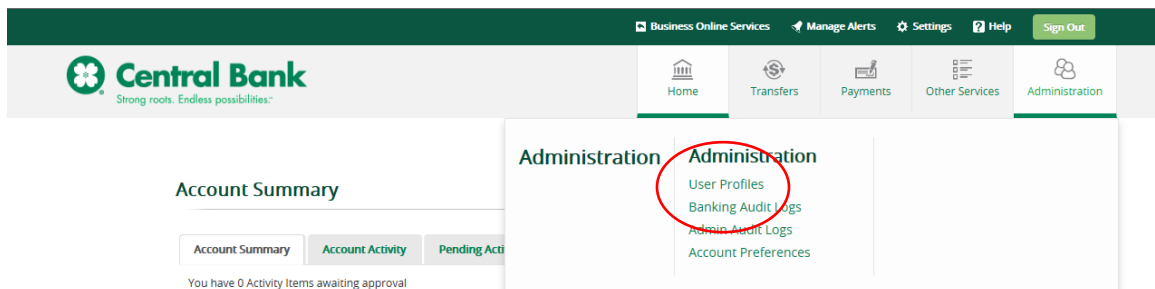


# Direct Connect Getting Started Guide for Quicken®

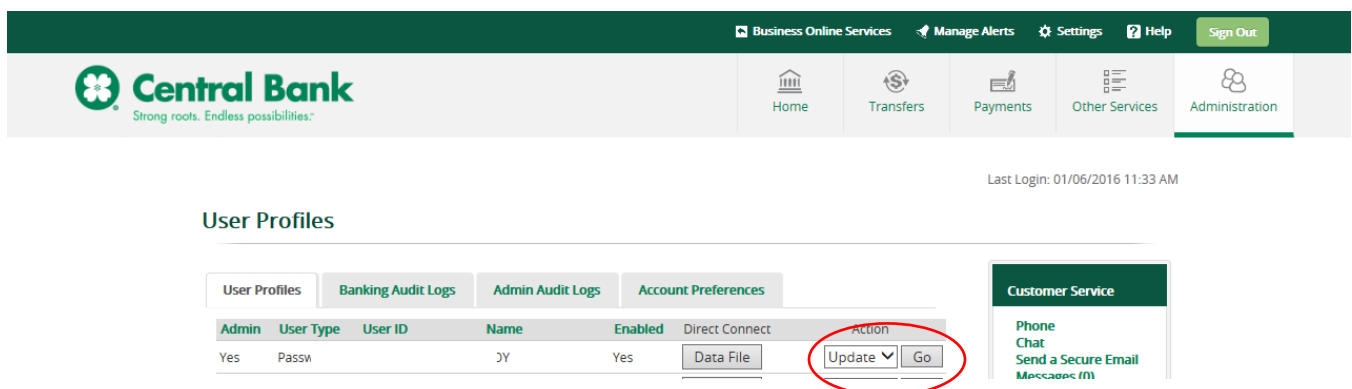
This guide describes a simple and complete path to activating Direct Connect capabilities between the bank and the Quicken software.

## To Enable Quicken for Your Business

1. Before you can download your transactions with Direct Connect, your company must first be enabled for this feature. Your Commercial Banking Services Representative at the bank can assist you with this. Additionally, you will need your BusinessLink User ID and Password. Once your company is enabled for Direct Connect, the following steps explain how to enable an existing or new Quicken account for transaction download.
2. After logging into Business Online Services, select BusinessLink. Scroll over **Administration**, and click on **User Profiles**.



3. Leave **Update** selected and click the **Go** button.



- The Company Administrator will need to ensure that the Direct Connect box(es) are checked for the accounts the user has access to. Once the accounts are selected, click **Finish**.

Business Online Services Manage Alerts Settings Help Sign Out

Central Bank Strong roots. Endless possibilities.™

Home Transfers Payments Other Services Administration

Last Login: 01/06/2016 11:33 AM

### Update User Profile

User Profiles Banking Audit Logs Admin Audit Logs Account Preferences

#### Account Permissions - ROY

##### Deposit Accounts

Bank	Account	Account Nickname	Can View Balance	Account Transfer To	Account Transfer From	Stop Payments	Direct Connect	Make Deposit (Mobile)	Bill Pay	Statements	Transaction Confirmation Notices
Central Bank			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central Bank			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Central Bank			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Click the **Data File** button on the User Profiles page.

Business Online Services Manage Alerts Settings Help Sign Out

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Home Transfers Payments Other Services Administration

Last Login: 01/06/2016 11:33 AM

### User Profiles

User Profiles Banking Audit Logs Admin Audit Logs Account Preferences

Admin	User Type	User ID	Name	Enabled	Direct Connect	Action
Yes	Password	I		Yes	Data File	Update Go

**Customer Service**

Phone  
Chat  
Send a Secure Email  
Message (M)

6. Congratulations! You may now go into Quicken and setup your bank accounts. To help protect the privacy and security of your information, the initial enrollment period is valid for 2 hours. This will provide you with ample time to establish your data file within Quicken. If you find you need more time than allotted, please click the Data File button on the User Profile page and you will be given an additional 2 hours.

Click **Finish**.

The screenshot shows the 'Administration' section of the Central Bank Business Online Services interface. At the top, there is a navigation bar with links for Business Online Services, Manage Alerts, Settings, Help, and Sign Out. Below this is the Central Bank logo and a menu with Home, Transfers, Payments, Other Services, and Administration. The main content area is titled 'Direct Connect' and includes tabs for User Profiles, Banking Audit Logs, Admin Audit Logs, and Account Preferences. The 'User Profiles' tab is active, displaying 'Direct Connect enabled accounts for this user:' followed by the account number '123456789'. A paragraph explains that the user can now access these accounts from Quicken or QuickBooks and that the initial enrollment period is valid for 2 hours. A 'Finish' button is located at the bottom of this section. To the right, there is a 'Customer Service' widget with links for Phone, Chat, and Send a Secure Email Messages (0). Below that is a promotional banner for 'Take control of your cash flow and expenses' with a 'Learn How' link. The footer contains copyright information for 2016 Central Bancorporation and links for Email Us, Mobile Site, Terms and Notifications, Privacy Policy, and Site Map.

# Installing and Setting Up Quicken for Windows

## 1. Install Quicken

Insert the Quicken CD and follow the installation instructions. (If you downloaded Quicken, run the installer program that was included with your download).

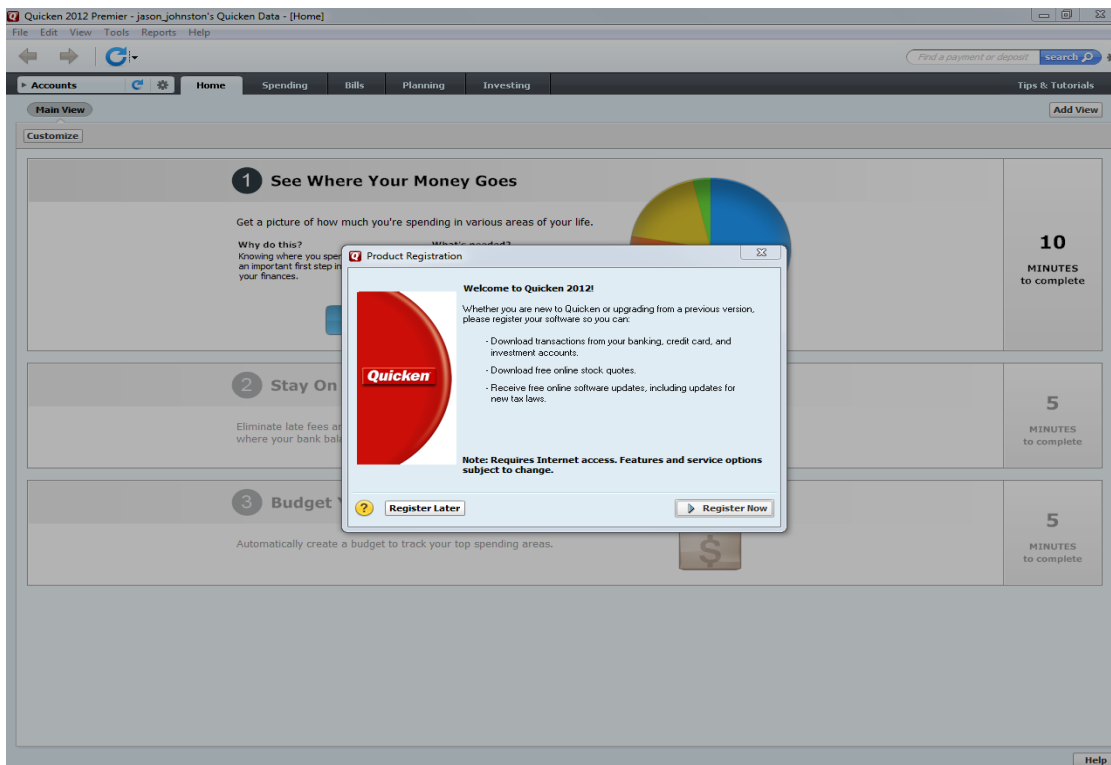
## 2. Register Quicken

When prompted, complete the Quicken Product registration.

Registering allows you to access Quicken's many online features such as One Step Update and Online Investment Tools.

## 3. Use the Setup Tab to Add Accounts

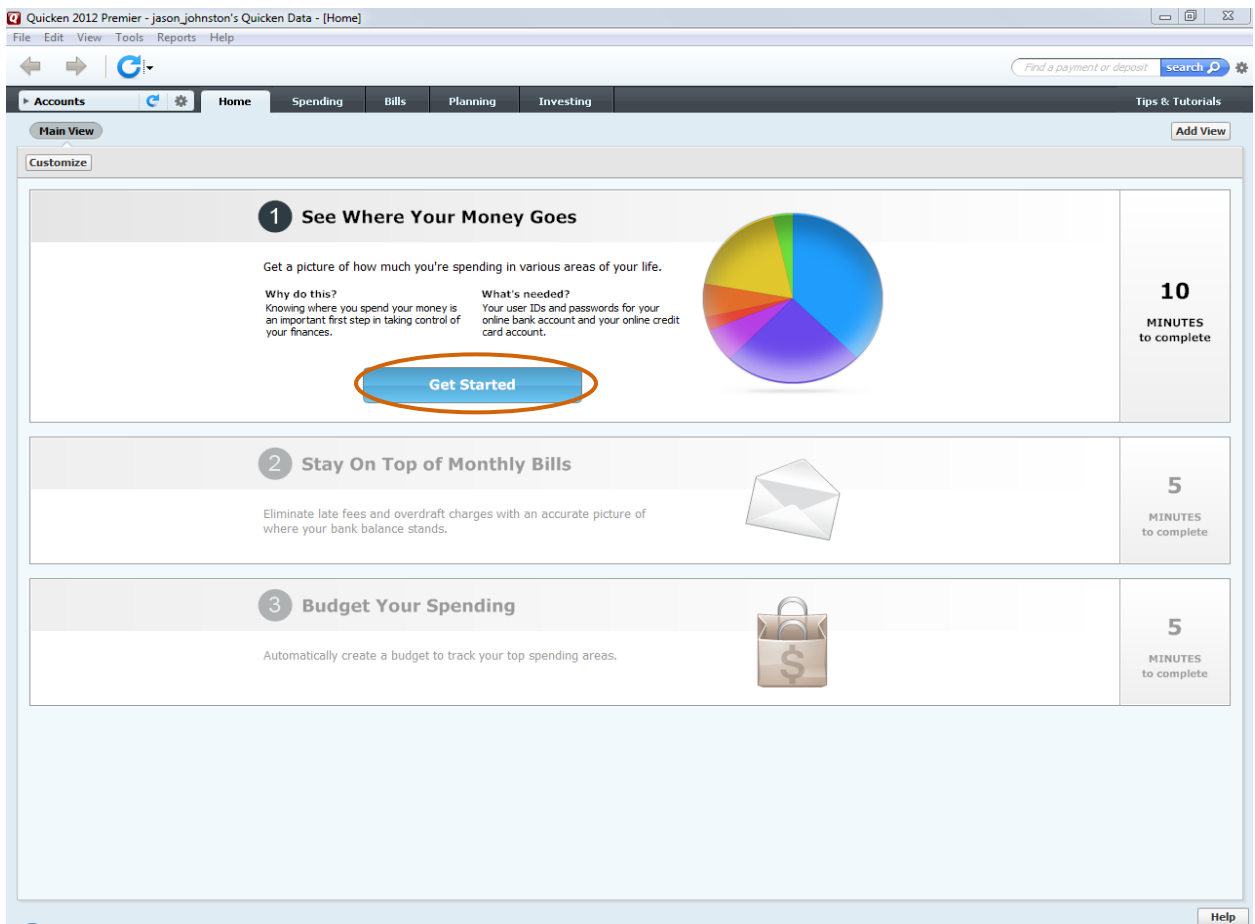
When you start Quicken for the first time, a dialogue box will ask you if you are a new user or a returning user. Select the one that applies to you and then it will ask you to register.

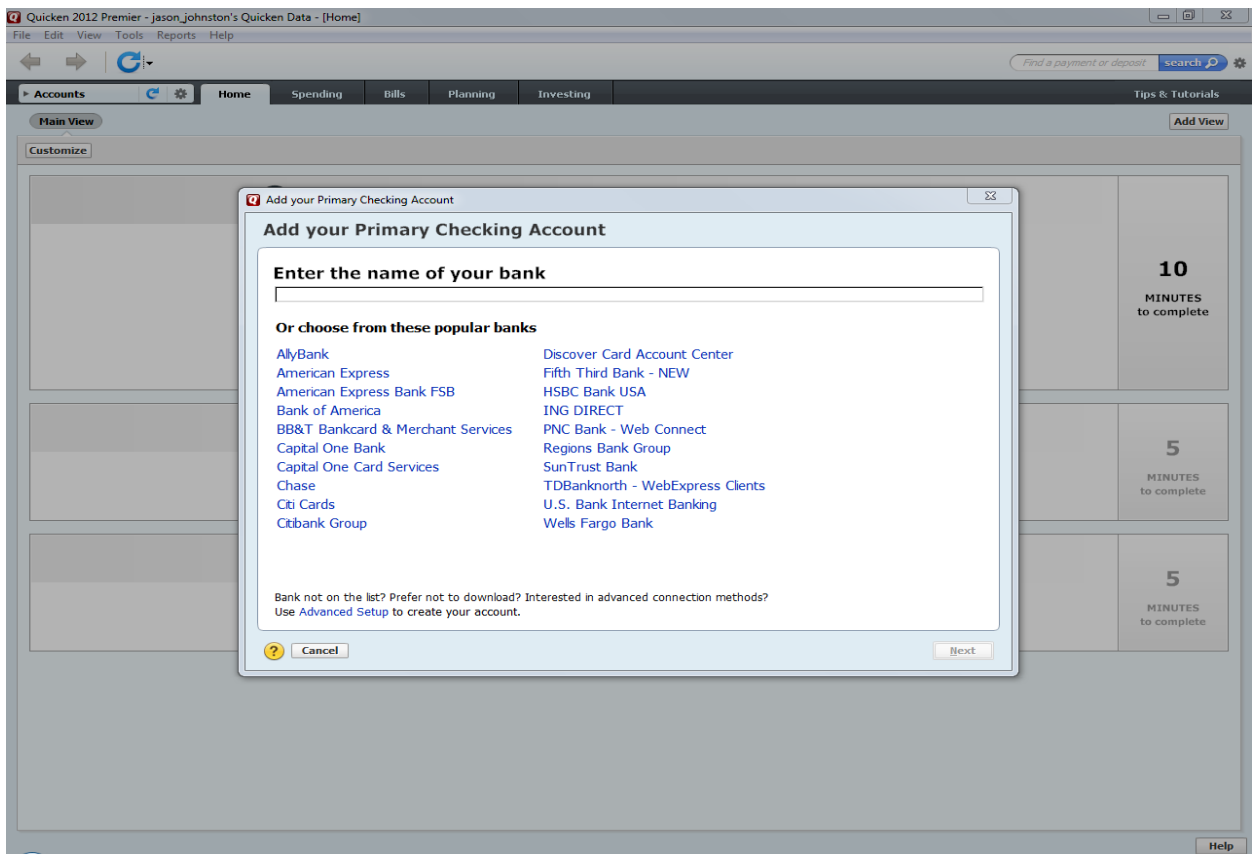


The **Home page** is where you can add your basic financial information to help you get the most out of Quicken. There are a number of options on this page and it is suggested that you enter the following at the very least:

- Your **Checking** and **Savings Accounts**
- Your **Bills** and **Deposits**

Simply click the **Get Started** button to add checking and savings accounts.





A new window will appear titled **Add your Primary Checking Account**. You will need to search for the bank's name inside of that window. Below is a list of Central Bancompany banks. The middle column is how Quicken has them labeled.

Central Bank of Boone County		
<b>Central Bank</b>	Central Bank Mo - Bus	www.centralbank.net
<b>Central Bank of Audrain County</b>	Central Bank of Audrain Co - Bus	www.centralbank.net
<b>Central Bank of Lake of the Ozarks</b>	Central BOLO – Bus	www.centralbank.net
<b>Central Bank of St. Louis</b>	Central Bank of St. Louis - Bus	www.centralbank.net
<b>Central Bank of the Midwest</b>	Central Bank of the Midwest - Bus	www.centralbank.net
<b>Central Bank of Moberly</b>	Central Bank of Moberly - Bus	www.centralbank.net
<b>Central Bank of the Ozarks</b>	Central Bank of the Ozarks - Bus	www.centralbank.net
<b>Central Bank of Warrensburg</b>	Central Bank of Warrensburg - Bus	www.centralbank.net
<b>Jefferson Bank</b>	Jefferson Bank – Bus	www.jefferson-bank.com
<b>Central Bank of Oklahoma</b>	Central Bank of Oklahoma – Bus	www.centralbank.net
<b>Central Bank of Branson</b>	Central Bank of Branson – Bus	www.centralbank.net
<b>Central Bank of Sedalia</b>	Central Bank of Sedalia - Bus	www.centralbank.net
<b>Central Bank of Boone County</b>	Central Bank of Boone County - Bus	www.centralbank.net

Q Add Checking Account

### Add Checking Account

**Enter the name of your bank**

**All results**

- Central Bank MO - Business
- Central Bank MO - Personal**
- Central Bank - Georgetown, KY
- Central Bank Houston
- Central Bank MO - Business
- Central Bank MO - Personal
- Central Bank of Georgia
- Central Bank of Missouri
- First Central Bank MO - Business
- First Central Bank MO - Personal
- South Central Bank Bowling Green
- South Central Bank Monroe Cty

Bank not on the list? Prefer not to download? Interested in advanced connection methods?  
Use [Advanced Setup](#) to create your account.

? Cancel Back **Next**

Once you have located your Financial Institutions name, click the **Next** button.

The next step in the Account Setup process is to connect to the bank.

Q Add Checking Account

### Add Checking Account


**Central Bank MO - Business**

WEB: [www.centralbank.net](http://www.centralbank.net) | TEL: 800-749-5344

**User ID**  
for your Central Bank MO - Personal account

**Password**  
for your Central Bank MO - Personal account

Save this password

 **Your credentials are safe with Quicken**

We use bank-level encryption to secure your login credentials, they cannot be compromised

[Learn more about our security](#)

? Cancel For more options use [Advanced Setup](#) Back **Connect**

Now you will need to enter in you the User ID and Password you use to login to Online Banking at the bank's website. Enter in your **User ID** and **Personal Password**. Click the **Connect** button.

*Note: Quicken will not connect to BusinessLink for automatic downloads until you have registered for Direct Connect through BusinessLink. You must have enabled Direct Connect in Online Banking within two hours before completing this step. If you have not enabled Direct Connect within Online Banking, you will need to do so. If two hours have lapsed, please sign into Online Banking, scroll over **Administration Preferences** and select **User Profiles**. On the User Profiles page, click the **Data File** button for the user.*

Quicken will now attempt to connect with the bank and update the financial institution information.



Once Quicken has successfully communicated with the bank, ***your Account Setup is Complete!***