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

1. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
2. Use the import dialog to select the Web Connect file you downloaded. An “Import Downloaded Transactions” window opens.
3. Select **Create a new Quicken account** to start a new file for an existing account and complete the prompts.
4. When Quicken confirms that the Web Connect data has been successfully downloaded to Quicken, select **OK.**
5. Repeat these steps for each account you would like to download into Quicken.

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

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 WC** 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, select **ADD** to add a new account to Quicken.
8. Click **Finish**.