



Intuit Products

Century Bank's online banking solutions allow customers to manage their accounts within various Intuit software programs. The Intuit product used will determine which instructions to follow.

Quicken is used by individuals and QuickBooks is used by businesses. Please note that some businesses use Quicken.

Quicken and QuickBooks

Both products allow for "**Web Connect**" which allows the customer to download account history from online banking into either a QBO file format (QuickBooks) or QFX file format (Quicken). The customer then uploads the file to the applicable Intuit program for reconciliation purposes. [Click here for instructions.](#)

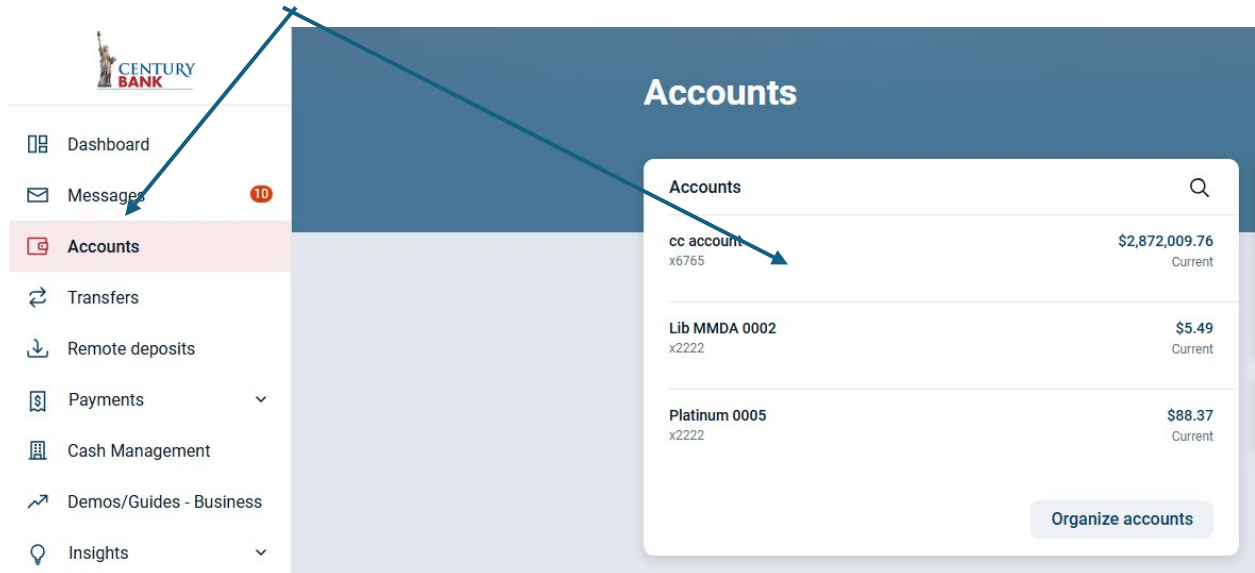
QuickBooks Direct Connect and **Quicken Direct Connect** allow the customer to connect to online banking from within the Intuit product to download account balance and transaction information. [Click here for instructions.](#)

QuickBooks Online

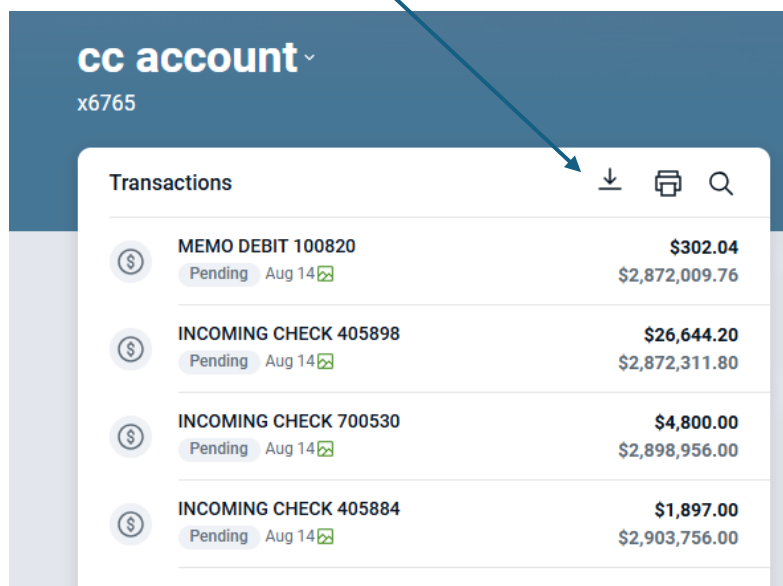
QuickBooks Online is used by business. This is a cloud-based product offered by Intuit that allows the customer to fully manage the business' financial affairs. The setup within the product allows for the software to automatically transfer balance and transaction history without intervention from the customer. [Click here for instructions.](#)

Quickbooks and Quicken Web Connect

1. Select **Account**



2. Select **Download** icon



3. Select **Date Range** and **File Type**

< Download activity
cc account (x6765)

Date range Last month >
Jul 1, 2026 - Jul 31, 2026

File type Spreadsheet >
CSV

Download

< Select a file type

Spreadsheet
CSV

Text file
TXT

Open Financial Exchange
OFX

QuickBooks
QBO

Quicken
QFX

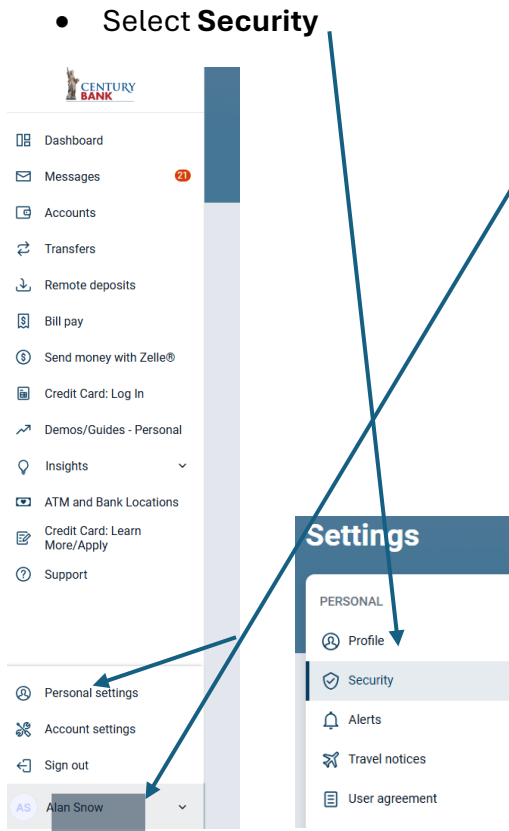
QuickBooks and Quicken Direct Connect

Step 1: Within QuickBooks/Quicken, select **Settings** for the applicable account and disconnect the current connection.

Step 2: Within Quickbooks/Quicken, select Add Account. Search for **Century Bank NM**. Proceed with establishing connection. You will receive a message directing you to your online banking to obtain additional information.

Step 3: Login to online banking to approve the Direct Connect application.

- From the main menu, select user name, then **Personal Settings**
- Select **Security**



- In the **Direct Connect** section, select **Manage** to approve the new connection.

Security

Username

Al@nsn0w Edit

Password

..... Edit

Passkeys

Sign into your account simply and securely without entering your password using a compatible device.

Add passkey

No passkeys registered

Connected apps

External app and website permissions that can access your account.

Manage >

Direct Connect

Approve connection requests for Intuit desktop products or Quicken.

Manage >

2-step verification



Enabled for Symantec VIP

Edit settings

Step 4: Return to Quickbooks/Quicken, select Add Account. Search for **Century Bank NM**. Proceed with establishing connection. *Rather than adding the account you will simply link the connection to your existing account.*

Please note: the process within Quickbooks/Quicken may require authentication to establish the new connection. Your authentication method (noted as **2-step verification** within online banking) must be set to Voice or Text, Authenticator App, or Symantec VIP. This can be edited, if applicable, by selecting your **Security** settings, and **2-step verification** within your online banking profile.

QuickBooks Online

Management of the connection will occur within QuickBooks Online.

Step 1: Select the applicable account(s)

Step 2: Disconnect the account

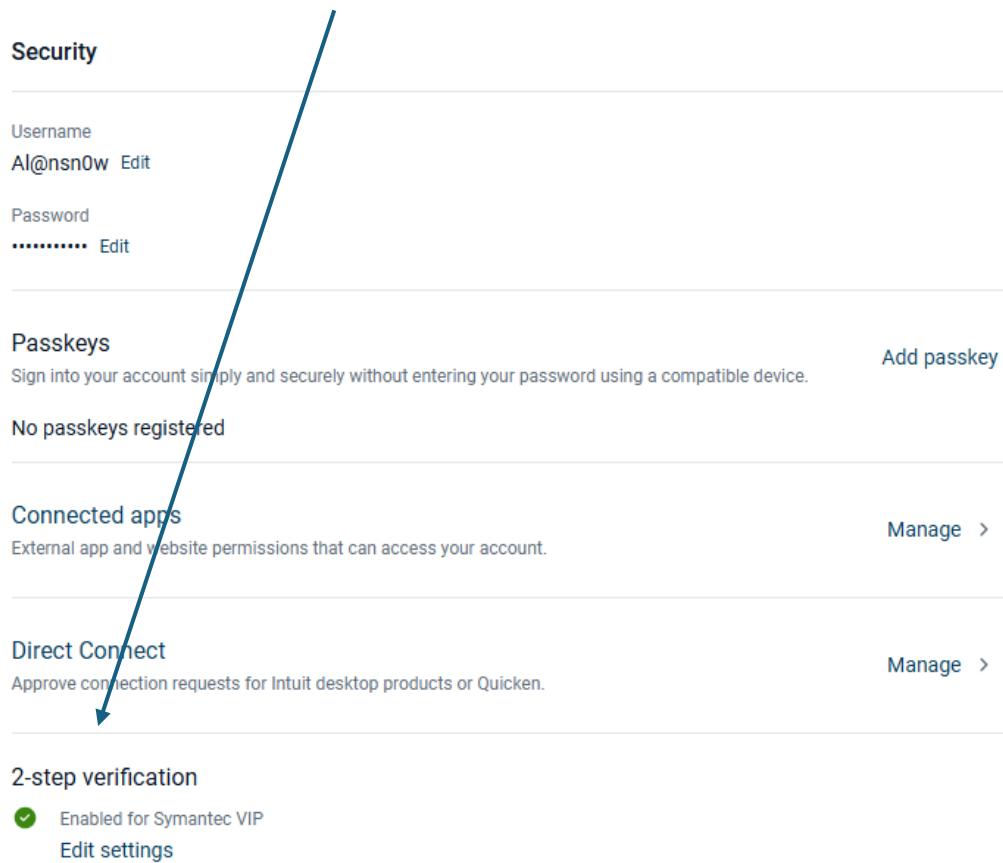
Step 3: Search for applicable bank connection

- Century Bank NM (Business Banking users)
- Century Bank NM-TM (My CB Treasury users)

Step 4: Proceed with connection.

Please note: the process within QuickBooks Online will require authentication to establish the new connection. Your authentication method (noted as **2-step verification** within online banking) must be set to Voice or Text, Authenticator App, or Symantec VIP.

Business Banking: 2-step verification can be edited, if applicable, by selecting your **Security** settings, and **2-step verification** within your online banking profile.



The screenshot shows the 'Security' settings page in QuickBooks Online. A blue arrow points from the top of the page down to the '2-step verification' section. The page is divided into several sections: 'Security' (with fields for Username and Password), 'Passkeys' (with an 'Add passkey' link), 'Connected apps' (with a 'Manage' link), 'Direct Connect' (with a 'Manage' link), and '2-step verification' (showing it is enabled for Symantec VIP with an 'Edit settings' link).

Security

Username
Al@nsn0w [Edit](#)

Password
..... [Edit](#)

Passkeys [Add passkey](#)
Sign into your account simply and securely without entering your password using a compatible device.

No passkeys registered

Connected apps [Manage](#) >
External app and website permissions that can access your account.

Direct Connect [Manage](#) >
Approve connection requests for Intuit desktop products or Quicken.

2-step verification
✔ Enabled for Symantec VIP
[Edit settings](#)

My CB Treasury: 2-step verification can be edited within your online banking profile by selecting Profile & Preferences, then Security and Password Settings.

The screenshot displays the My CB Treasury online banking interface. At the top, there is a navigation bar with links for Message Center, Notifications, Cut-Off Times, Last Login (08/15/2026, 09:45 PM, MST), and a user profile dropdown for KROMERO26 (centurytestbank). The dropdown menu includes options for Profile & Preferences, Notification Setup, and Log Out. Below the navigation bar, there is a main menu with links for DASHBOARD, ACCOUNTS, PAYMENTS, RECEIVABLES, and REPORTS. The main content area is titled "My Profile" and contains two sections: "User Information" and "Security Preferences". The "User Information" section displays fields for Name (Kenneth Romero), TM User ID (KROMERO26), Digital ID (kromero26), Email (kenneth.romero@mycenturybank.com), Phone # ((505) 424-2817), Mobile # ((505) 660-1217), and Fax #. The "Security Preferences" section includes a button for "Security and Password Settings", radio buttons for "Account Nicknames" (selected) and "Account Numbers", a toggle for "Account Number Masking" (Active), and radio buttons for "Preferred Method of Verification" (Text Message selected, Automated Phone Call). At the bottom of the "Security Preferences" section are "Save" and "Cancel" buttons. A blue arrow points from the "Profile & Preferences" menu item to the "Security and Password Settings" button.

Message Center Notifications Cut-Off Times Last Login: 08/15/2026, 09:45 PM, MST Hi KROMERO26 (centurytestbank) ▾

DASHBOARD ACCOUNTS ▾ PAYMENTS ▾ RECEIVABLES ▾ REPORTS

My Profile

User Information

Name: Kenneth Romero
TM User ID: KROMERO26
Digital ID: kromero26
Email: * kenneth.romero@mycenturybank.com
Phone #: * (505) 424-2817 Ext.
Mobile #: ⓘ (505) 660-1217
Fax #:

Security Preferences

Security and Password Settings

☒ Account Nicknames ☐ Account Numbers

Account Number Masking: ⓘ **Active**

Preferred Method of Verification: ☒ Text Message ☐ Automated Phone Call

Save Cancel