



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**

Accounts	
cc account x6765	Current
Lib MMDA 0002 x2222	\$5.49 Current
Platinum 0005 x2222	\$88.37 Current

Organize accounts

2. Select **Download** icon

Transactions	
MEMO DEBIT 100820	\$302.04
Pending Aug 14	
INCOMING CHECK 405898	\$26,644.20
Pending Aug 14	
INCOMING CHECK 700530	\$4,800.00
Pending Aug 14	
INCOMING CHECK 405884	\$1,897.00
Pending Aug 14	



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



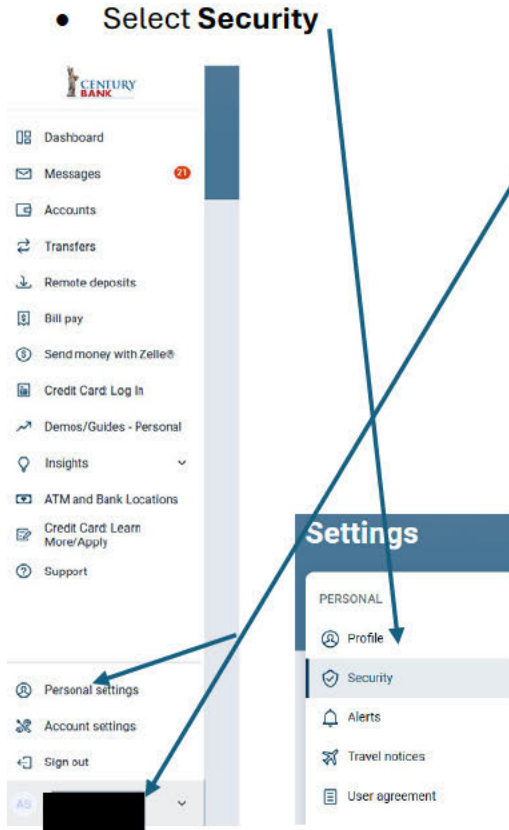
QuickBooks and Quicken Direct Connect

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

[REDACTED]

[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.

Security

Username

[Redacted] [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](#)



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

Message Center Notifications Cut-Off Times Last Login: 08/15/2026, 09:45 PM, MST Hi [Redacted]

DASHBOARD ACCOUNTS PAYMENTS RECEIVABLES REPORTING

Profile & Preferences
Notification Setup
Log Out

My Profile

User Information

Name: [Redacted]
TM User ID: [Redacted]
Digital ID: [Redacted]
Email: * [Redacted]
Phone #: * [Redacted] Ext. [Redacted]
Mobile #: ⓘ [Redacted]
Fax #: [Redacted]

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