Financial Software - Quicken

1. Open Quicken.
2. You can click on the **Get Started** button under the first section titled "**See Where Your Money Goes"**. Or you can click on **Tools** from the Menu bar. Then, click on **Add Account…** and then click on **Checking** or **Savings** from the options.
3. Type in "**Franklin Synergy"** where it asks to **Enter the name of your bank.**
4. Click on **"Franklin Synergy DC"**, or the third option in the list that comes up.
5. Enter you User ID and Password from Internet Banking. You may test that you have everything correct here by going to www.franklinsynergybank.com and make sure you login successfully with those same credentials. If you are sure they are correct, you can check the "**Save this password**" checkbox. Click the **Connect** button.
6. If you check the "**Save this password**" option, you may be asked to setup your **Password Vault** or to enter your password you have previously setup for the **Quicken Password Vault**. Enter this and then click the **Connect** button.
7. You should get back a list of all accounts with our bank and how many days of transaction history was returned for each account.
8. Most all of your accounts will return 90 days of transactions or close to that. Click on the **Finish** button.
9. You should be able to now click on any accounts in your **Accounts** list to see the transactions for that account.

Other Notes

- If you have any trouble with this process, you may call us at (615) 236-2963 or e-mail us at InternetBanking@franklinsynergy.com.