

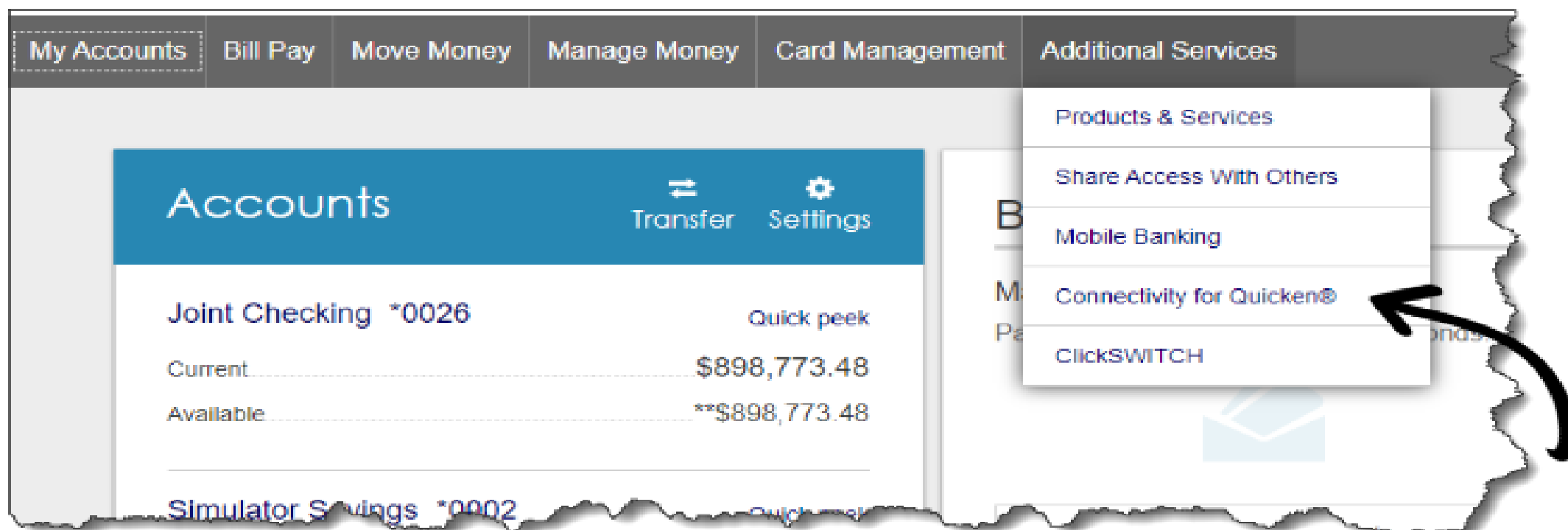
The image features the text "User Experience" centered in a bold, black, sans-serif font. The text is overlaid on a graphic consisting of two large, light green, curved arrows that form a circular path around the text. The arrows have a slight 3D effect with a darker green shadow on their inner curve. The background is a light, off-white color with rounded corners.

User Experience

Direct Connect Registration

Users can easily register themselves within Online Banking via “Connectivity for Quicken and QuickBooks” in the Additional Services menu.

Your FI can rename this option in the menu as well as move it to another menu.



Your financial institution can register a user in Admin Platform as well. Either way, registration is required.

Direct Connect Registration

The user creates a Direct Connect password. Your financial institution determines if the Online Banking password can be used, or if the passwords must be unique. The user agrees to the disclosure (if presented), and clicks Submit.

Connectivity for Quicken® and QuickBooks®

Welcome to Direct Connect Registration. This is a service we provide that enables you to access your accounts using Quicken® or QuickBooks®. Please create a connectivity password in order to begin using this service.

Enter and confirm the password below that you wish to use. Your password must be between 6 and 8 characters, may be alpha-numeric and is case-sensitive.

Create Password:

Re-enter Password:

I agree to the [terms and conditions](#) of the Online Banking Access Agreement.

Begin connecting your accounts

To begin accessing your accounts on Quicken® or QuickBooks®, simply enter your User ID and your new Direct Connect password into the add account wizard.

Password Requirements

- ✓ Between 6 and 8 characters
- ✓ Does not contain special characters
- ✓ Passwords must match

Most elements of this page are customizable, except the password criteria and the dialog box on the right.

Direct Connect Registration

A **successful registration** returns this message:



The system sends two emails: one to the user and one to your financial institution.

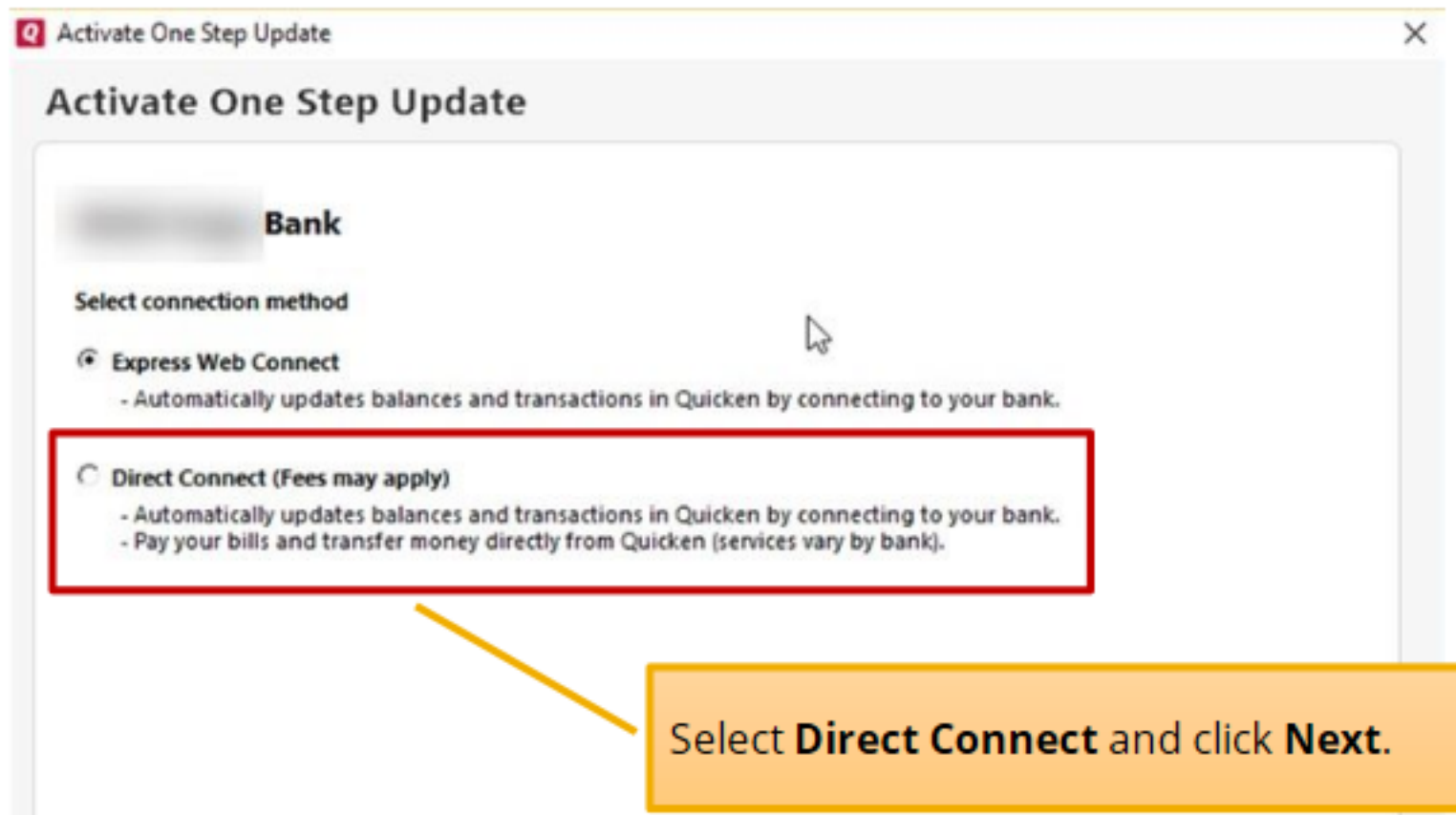
Registered users returning to this screen see:



Basically, once a user completes the registration, there's no reason to return to this screen.

Activate Direct Connect in Quicken

Whether you are adding a new account or adding online services to an existing account, you arrive on the Activate One Step Update prompt.



Activate Direct Connect in Quicken

Q Activate One Step Update

Activate One Step Update

Bank

Username
for your [Bank account]

Password
for your [Bank account] [Show](#)

Save this password

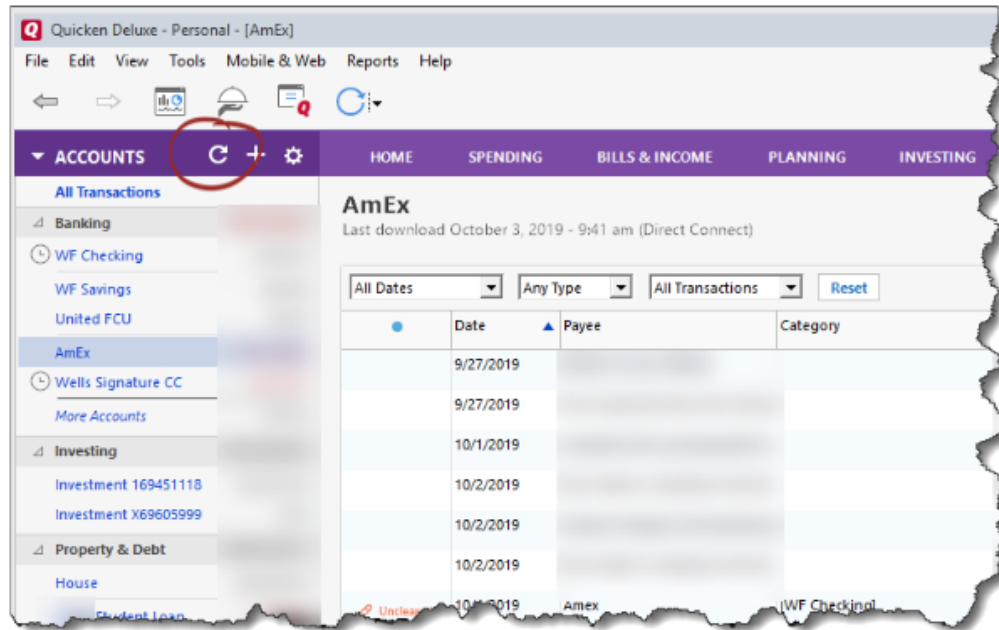
NOTE: [Bank] charges a monthly fee for Direct Connect. Learn more at [Link]

On the Activate One Step Update screen, enter your **Online Banking username** and the **Direct Connect password**.

Click **Connect** and the PFM will contact your FI to confirm the account and initiate the first download of transactions.

One Step Update

To initiate Direct Connect downloads ongoing, go to the One Step Update screen by selecting the circular arrow icon in the Accounts panel.



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