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: [redacted]
Re-enter Password: [redacted]

I agree to the terms and conditions of the Online Banking Access Agreement.

Submit

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:

Connectivity for Quicken® and QuickBooks®

You are now registered to use Connectivity for Quicken® and QuickBooks®.

You are enrolled to use online services through Quicken® or QuickBooks®. Enter your password selected during the enrollment process to begin accessing your accounts.

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

Registered users returning to this screen see:

Connectivity for Quicken® and QuickBooks®

You are enrolled to use online services through Quicken® or QuickBooks®. Enter your password selected during the enrollment process to begin accessing your accounts.

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.

Select Direct Connect and click Next.
Activate Direct Connect in Quicken

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.

Enter the Direct Connect password.

Click Update Now.