

# Direct Connect Activation

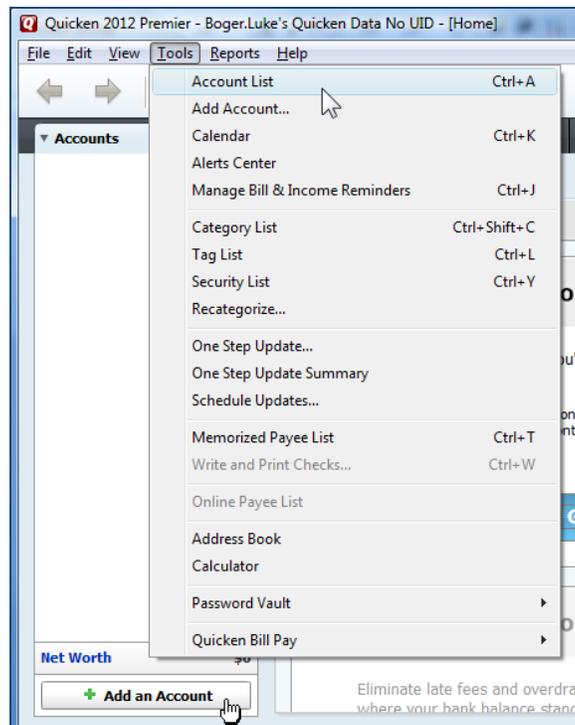
## End User Setup (Quicken)

*Please note: The screenshots contained in this document are provided for illustration purposes only. User experience may vary depending slightly on the Quicken version being used.*

If the user has not yet connected accounts to Quicken (with Northwest or any another financial institution), they will likely be presented with a screen similar to the one below upon opening the software. Selecting **Get Started** is the simplest way to start the process of connecting with Northwest Online Banking.



Alternatively, or if the user has already connected accounts may select either the **Add an Account** button at the bottom of the accounts list, or select the menu option **Tools > Add Account**.



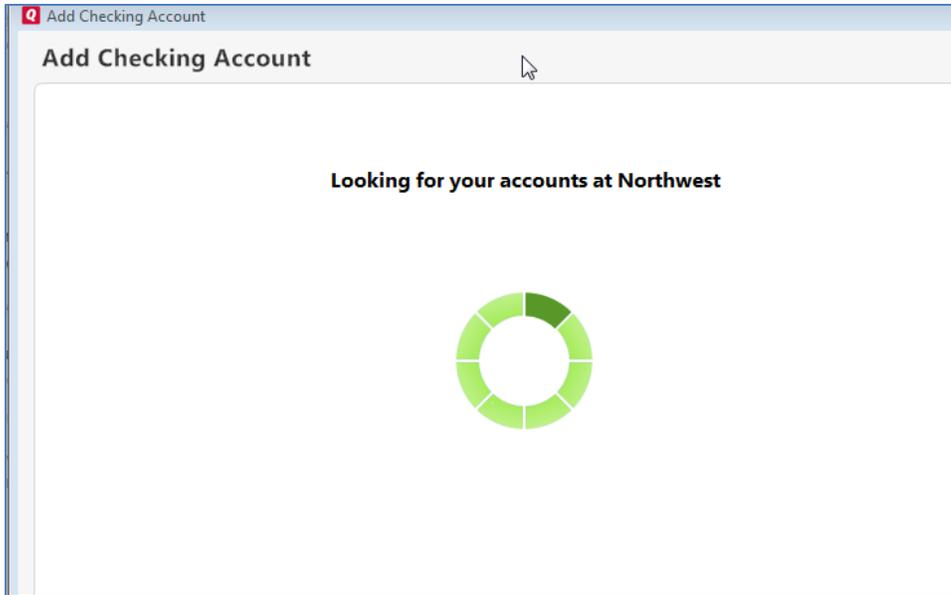
After selecting one of the options above and possibly selecting the type of account that will be added, the user will be prompted to enter the bank name. Search and select **Northwest**.

The screenshot shows a window titled "Add Checking Account" with a search bar containing "Northwest". Below the search bar, a list of search results is displayed under the heading "All results". The first result, "Northwest", is highlighted with a blue background and a red border. Other results include "Northwest Arkansas FCU", "Northwest Bank", "Bank NorthWest", "CU Northwest", "First Bank NorthwestNow Sterlin", "First Financial Northwest Bank", "First National Bank Northwest FL", "First Northwest Bank", "First State Bank of Northwest Ar", "Georgia Power Northwest FCU", and "Great NorthWest FCU". At the bottom of the list, there is a note: "Bank not on the list? Prefer not to download? Interested in advanced connection methods? Use [Advanced Setup](#) to create your account." The window has "Cancel", "Back", and "Next" buttons.

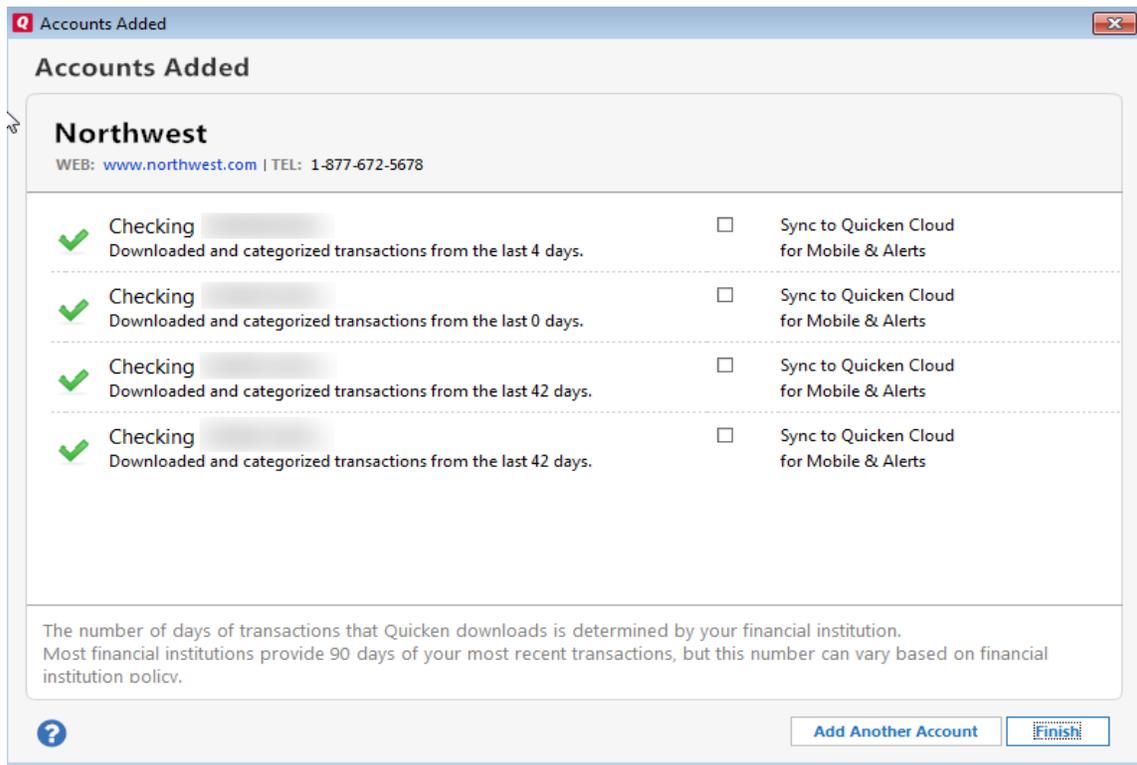
The user is prompted to enter their Northwest Online Banking login credentials and then **Connect**.

The screenshot shows the "Add Checking Account" dialog box with "Northwest" selected. The "Northwest" header is displayed, along with the website "www.northwest.com" and phone number "1-877-672-5678". Below this, there are two input fields: "Northwest User ID / User Name" and "Northwest password". The password field has a "Show" button. A checkbox labeled "Save this password" is present. To the right of the input fields is a yellow security box with a padlock icon and the text: "Your credentials are safe with Quicken. We use bank-level encryption to secure your login credentials, they cannot be compromised. We use a read-only connection to your bank. We cannot move or transfer money. [Learn more about our security](#)". At the bottom, there are "Cancel", "Back", and "Connect" buttons, along with the text "For more options use [Advanced Setup](#)".

Several types of loading screens may display to the user as the accounts are retrieved.

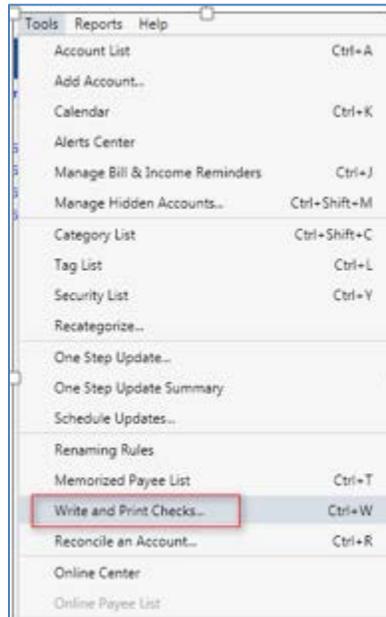


A list of accounts found in the Online Banking profile will be presented to the user, who may then add additional accounts or **Finish**.

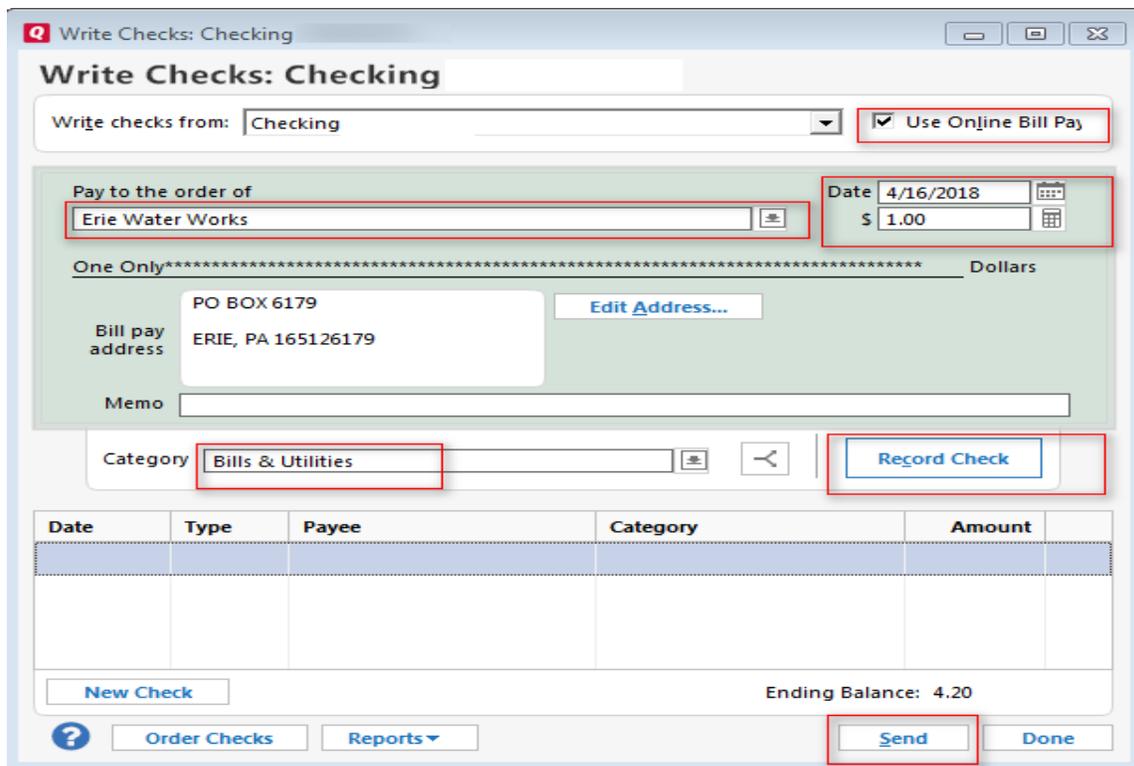


# Creating Online Bill Payments

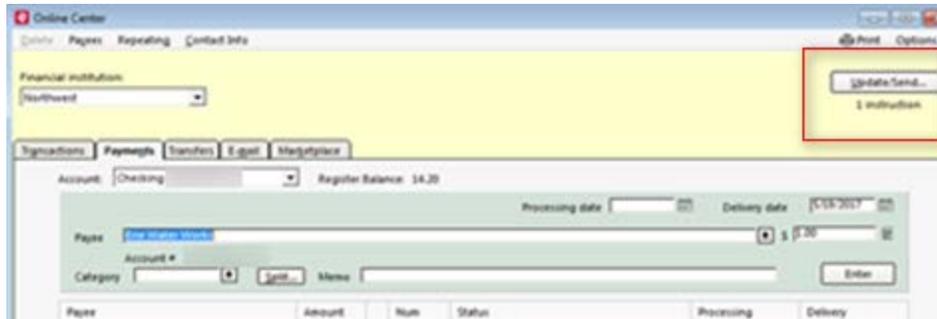
To submit a payment through BillPay, the user can select "Write Checks" from the **Tools** menu.



A box will be presented to complete the biller information. Make sure the **Use Online Bill Pay** box is checked and the user's Online Banking payees will display in the **Pay to the Order of** menu. Complete the amount, Date, and Category information and select **Record Check**, and then select **Send**.

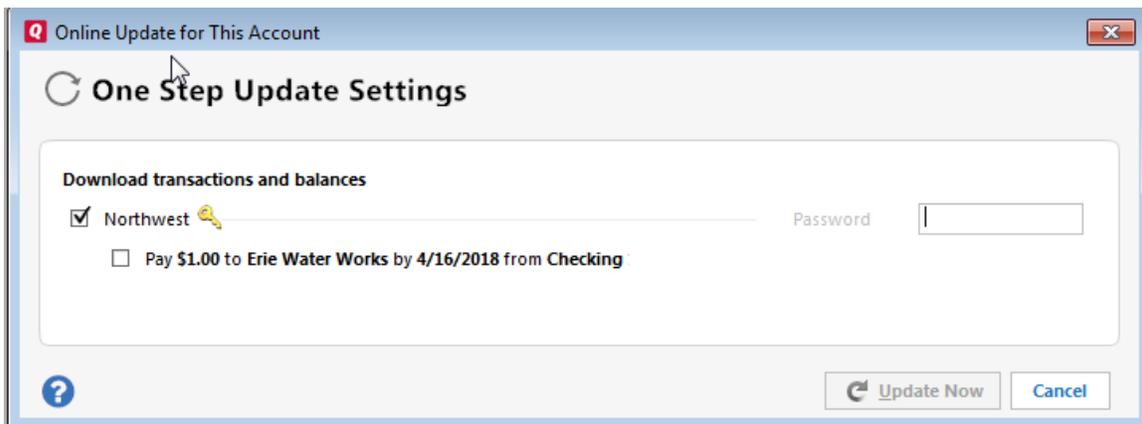


The user will then be presented with the Online Center, select **Update/Send** to send the transaction to Online Banking.

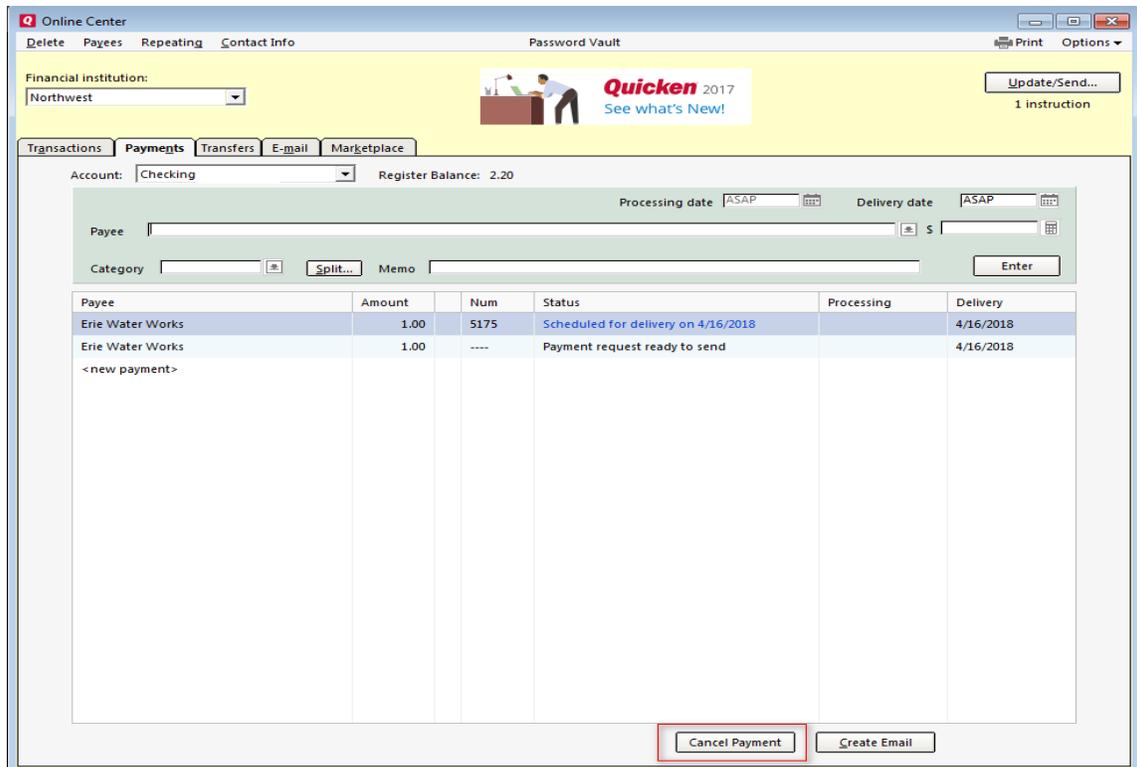


**Note:** Bill Payments and transfers can also be created directly from the Online Center in the corresponding tabs by completing the information and selecting **Enter**, then selecting **Update/Send**.

The user will be prompted to enter their password and then select **Update Now**.



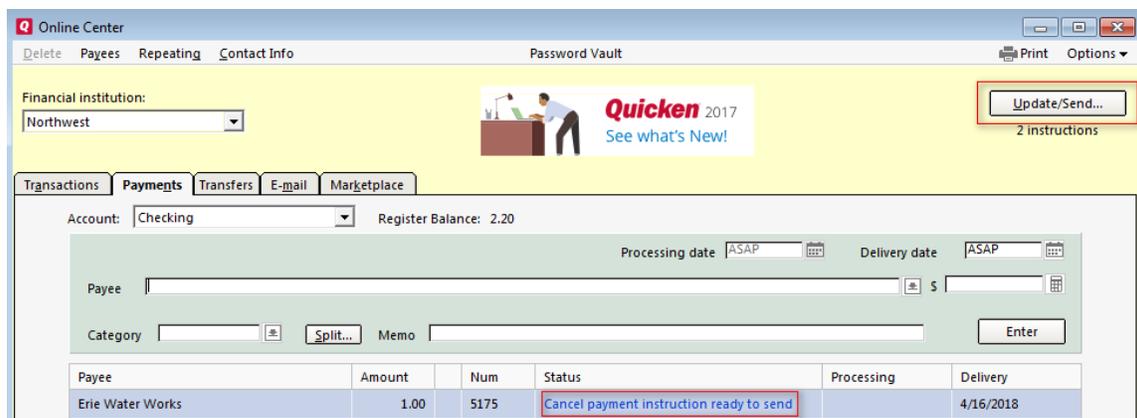
To cancel a payment, from the **Online Center** highlight the payment that needs canceled and select **Cancel Payment**.



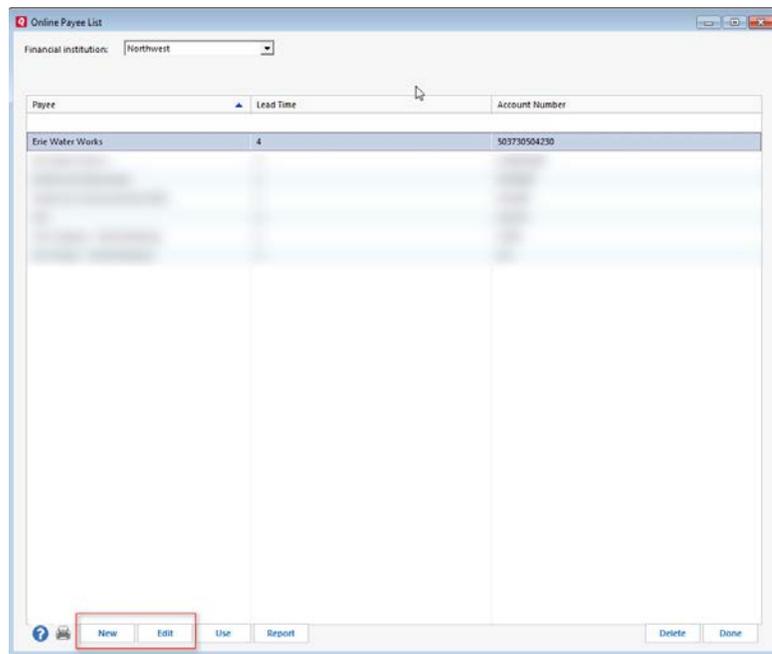
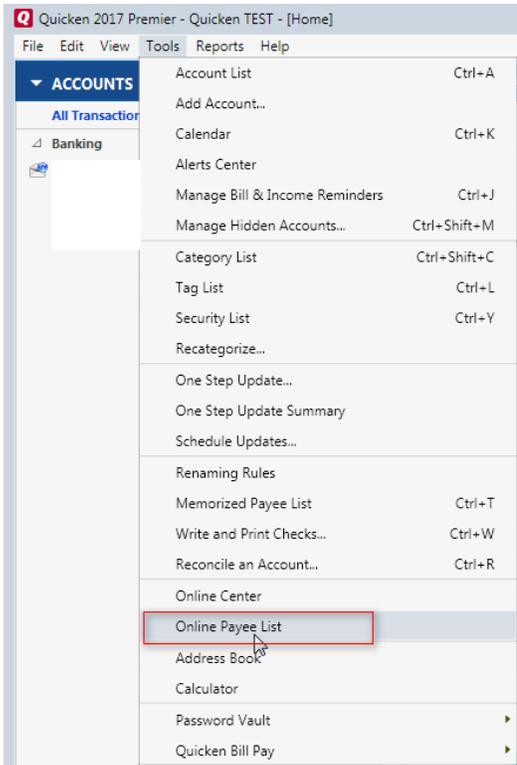
Select **Yes** to confirm.



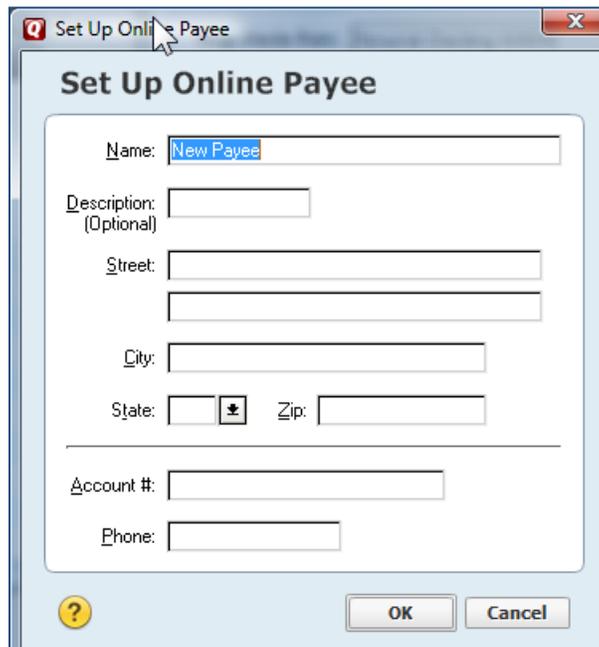
Select **Update/Send** to cancel the payment in Online Banking and enter password when prompted.



Users can also edit payees and/or create new payees by selecting the **Online Payee List** from the **Tools** menu. Once the list is open, select the payee to be modified, or select **New** or **Edit**.

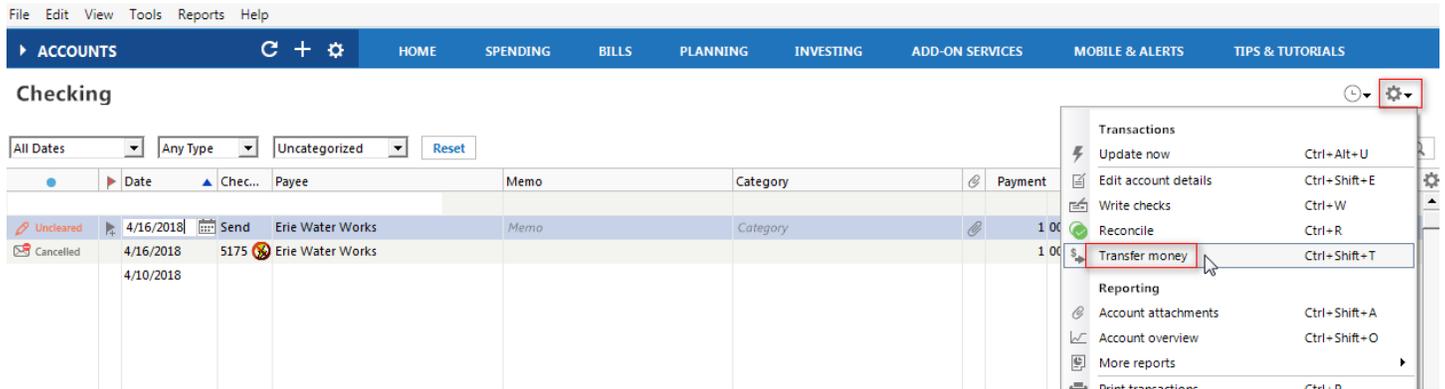


Complete the information that is requested and select **OK** –then confirm by selecting **OK & Accept**.

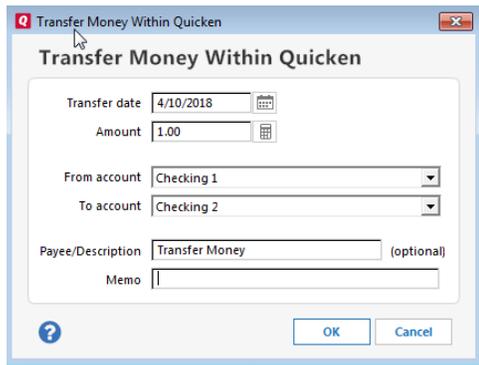


# Completing a transfer

To perform a transfer, select the **Transfer Money** option from the **Account Actions** menu. (Note: Depending on your Quicken version, this menu option may just be a “gear” symbol).



The **Transfer Money** window will be presented, complete your transfer information and select **OK**. The option to **Transfer Online**, **Record Only** or **Cancel** will display. To send this transaction to the Online Center for processing, select **Transfer Online**. To just record the transaction and *not* send the transaction to Online Banking, select **Record Only**.



Once **Transfer Online** is selected, the transaction will be listed in the register with “OXfr” listed in the Check Number field. This indicates that it was completed via Direct Connect but has not yet been processed. Once the transaction via has been processed via One Step Update, a lightning bolt will be present next to Oxfr indicating the transaction’s completion.

