svb ❭ Private

Quicken – MAC – Direct Connect

Direct Connect - Setup

Procedure

Task 1: Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up*, select **Backing up data files**, and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Updates*, select "Check for Updates," and follow the instructions.

Task 2: Enrollment for Direct Connect Access

> **IMPORTANT:** We have implemented enhanced security to help protect your information transmission via Quicken Direct Connect. If you are initiating your first Direct Connect connectivity, please contact the Concierge Desk at 888-322-2120 to request access to enable Direct Connect from Digital Banking.

1. Call the Concierge Desk at 888-322-2120

   a. Request access to enable Direct Connect from Digital Banking

2. Proceed with the instructions below

Task 3: Setup One Step Update for Accounts in Quicken

1. Navigate to **Accounts** and select the "**+**" icon to Add Account.

2. Choose **Checking**.

3. Search for **SVB Private – Legacy BP Client**

4. Enter your Digital Banking **Username** and **Password** and click **Continue**.

   > **NOTE:** Select "**Direct Connect**" for the "Connection Type" if prompted.

5. In the "**Accounts Found**" screen, associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link"** to pick your existing account.

   > **IMPORTANT:** Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.

6. Select **Finish**.

Task 4: Online Bill Payment

> **IMPORTANT:** Online Bill Payment feature is only supported with Private Digital Banking - Personal Bill Pay. This feature is used to transmit bill payments and biller (payee) details to/from Quicken.

1. User must have bill pay enabled via their Private Digital Banking username

2. Quicken screen:

   a. Select the account that is enabled for bill pay on you Digital Banking profile.

   b. Select Settings (navigate to the bottom left corner of screen)

   c. Account Settings:

   - Go to, Downloads (tab)
     - o   Connection Type: **Direct Connect**
   - Bill Pay (tab)
     - o   Bank Bill Pay
     - o   Status:
       - a) **Enabled** / Disable Bank Bill Pay
       - b) Not Enabled / Enable Bank Bill Pay
     - o   Done