svb › Private

Quicken – Windows – Direct Connect

Direct Connect - Setup

Procedure

Task 1: Preparation

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1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for *Backup Data File* and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for *Update Software* 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

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1. Choose **Tools** menu > **Add Account**.

2. Enter *SVB Private – Legacy BP Client* in the search field, select the name.

3. Select **Advance Options**

4. Select **Direct Connect** and click **Next.**

5. Select, Type of Account: **Banking Account** and **Next.**

6. Enter your Digital Banking **Username** and **Password** and click **Connect**.

7. Accounts Found: Action

    a. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to existing account** and select the matching accounts in the drop-down menu.

b. If it's a new Account, choose **Add to Quicken.**

8. After all accounts have been added/matched, click **Next**. You will receive confirmation that your accounts have been added.

9. Click **Done** or **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. Navigate to the Accounts, and right click on the account that is enabled for bill pay on you Digital Banking profile.

    b. Select, Edit/Delete account

    c. Account Details screen:

        • Go to, Online Services (tab)

        • Online Bill Payments

            o Payment Method: Bank Bill Pay

            o Online Bill Pay: No (not enabled)/Yes (enabled)

            o Action: Check for Bank Bill Pay (not enable)/Deactivate (enabled)

Payment Method	Online Bill Pay	ⓘ	Action
Quicken Bill Manager	No		Set up Bill Manager
Bank Bill Pay	No		Check for Bank Bill Pay