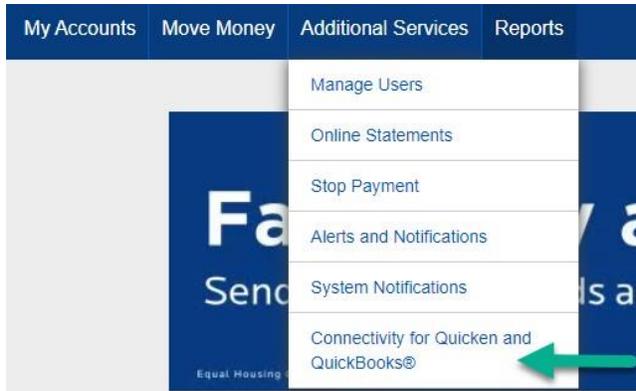


Quicken Direct Connect Setup Instructions:

****Skip to Step 3 if you've already setup credentials for Quickbooks. Credentials setup here can be used for both Quickbooks and Quicken****

1. Setup up Direct Connect within the Business Banking Platform:



2. Create password and click "Update"

*Password requirements:

1. There should be 11+ characters
2. Should contain alphabets, numbers and special characters
3. List of supported special characters: # \$ % & ' () * + , - . / : ; < = > ? @ ~ ^ { | } ~

Connectivity for Quicken® and QuickBooks®

Welcome to Direct Connect Reset Password

Enter and confirm the password below that you wish to use. Your password must be between 11 and 32 characters.

New Password:

Re-enter Password:

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

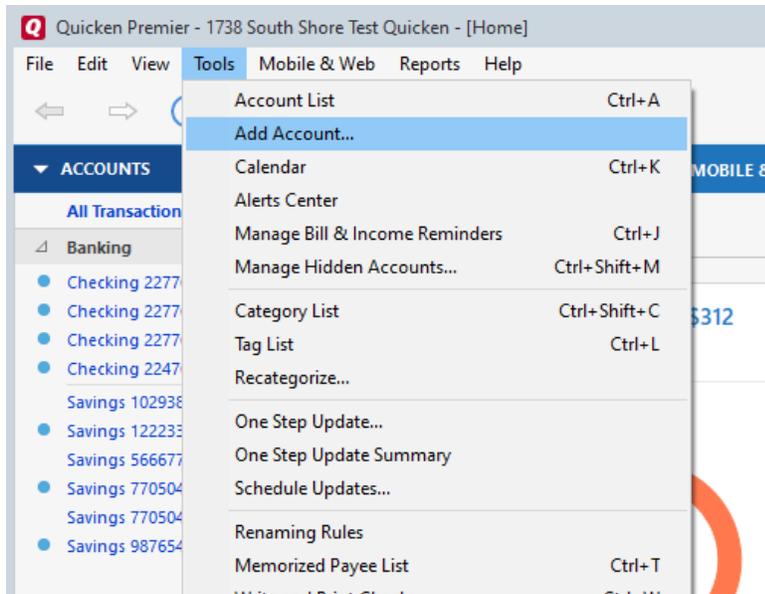
Begin connecting your accounts

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

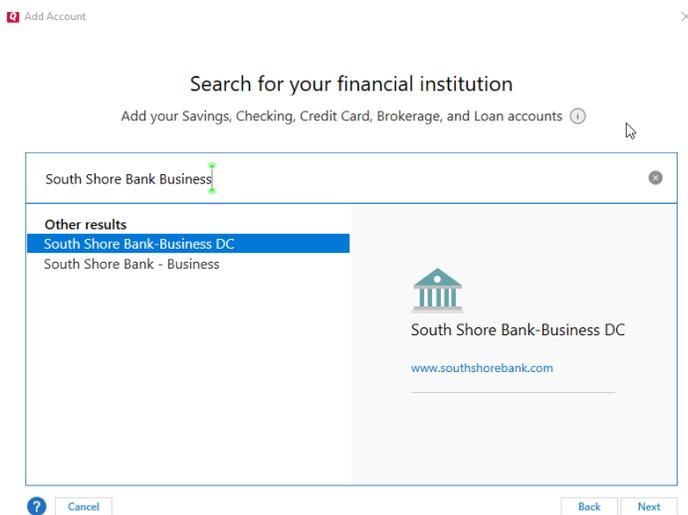
Password Requirements

- ✓ Between 11 and 32 characters
- ✓ Must contain letters, numbers and special characters
- ✓ Passwords must match

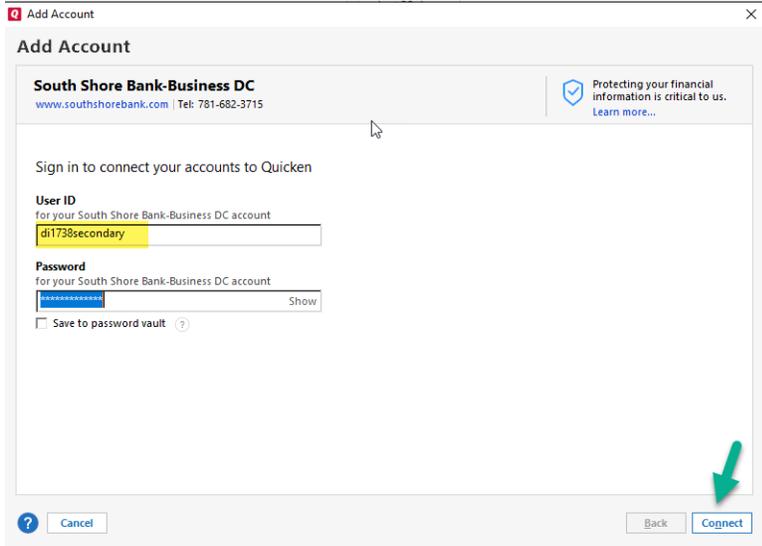
3. Open Quicken and navigate to your Business Quicken file. Click Tools→Add Account



4. Search for your Financial Institution *Christian Community CU BBDC*



5. Sign in to connect your accounts using the userID you created in Business Banking (from Step 1&2)



Add Account

South Shore Bank-Business DC
www.southshorebank.com | Tel: 781-682-3715

Protecting your financial information is critical to us.
[Learn more...](#)

Sign in to connect your accounts to Quicken

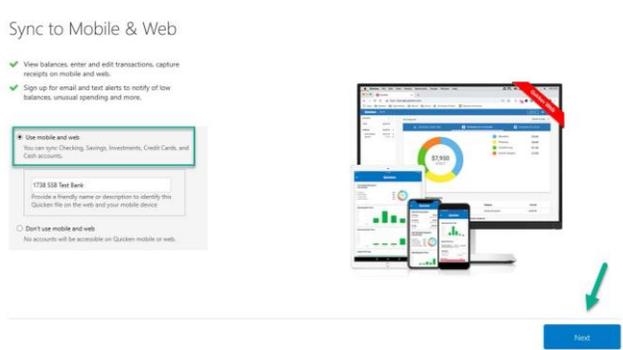
User ID
for your South Shore Bank-Business DC account
di1738secondary

Password
for your South Shore Bank-Business DC account
[masked] Show

Save to password vault ?

Cancel Back **Connect**

6. Sync to Mobile & Web



Sync to Mobile & Web

- View balances, enter and edit transactions, capture receipts on mobile and web.
- Sign up for email and text alerts to notify of low balances, unusual spending and more.

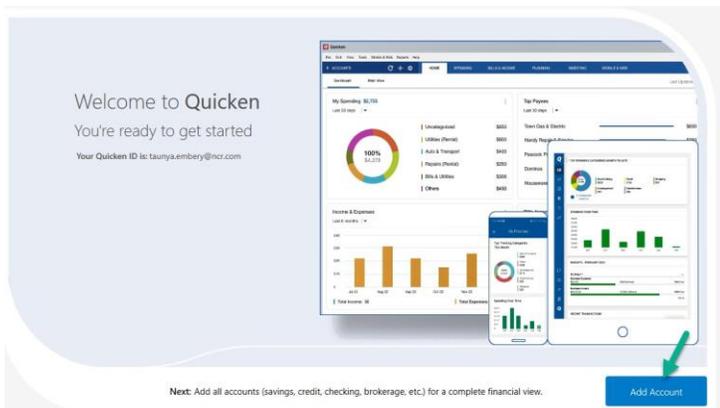
Use mobile and web
You can sync Checking, Savings, Investments, Credit Cards, and Cash accounts.

Don't use mobile and web
No accounts will be accessible on Quicken mobile or web.

1738 558 Test Bank
Provide a friendly name or description to identify this Quicken file on the web and your mobile device.

Next

7. Welcome to Quicken – Click Next



Welcome to Quicken
You're ready to get started
Your Quicken ID is: taunya.embery@ncr.com

Next: Add all accounts (savings, credit, checking, brokerage, etc.) for a complete financial view.

Add Account

8. Success – Accounts Added – Click Finished

