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