

NETXINVESTOR INTEGRATION WITH QUICKEN

To ensure successful integration with Pershing via Quicken, please follow these steps when assisting your clients:

1. Platform Selection

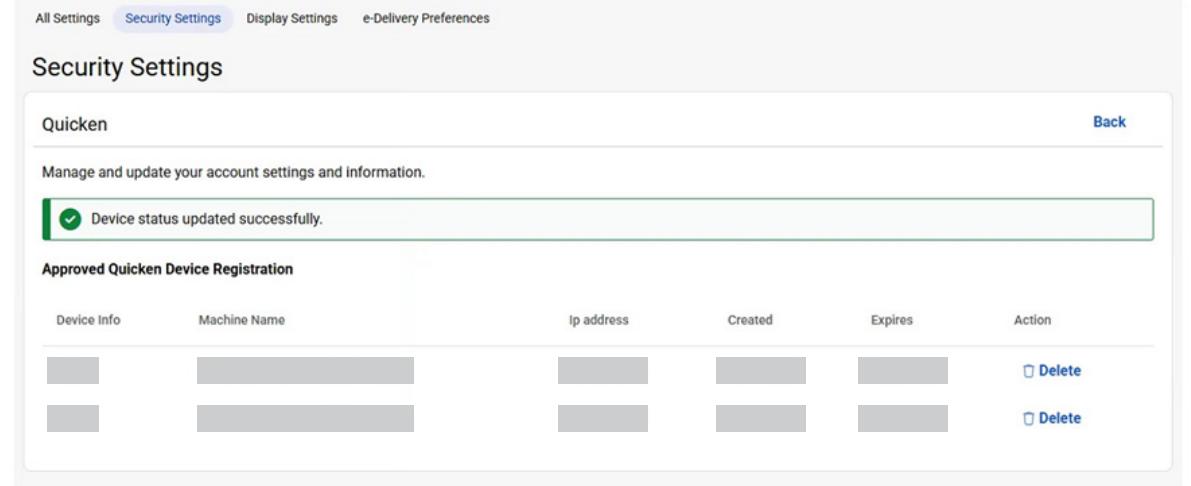
- Clients must choose NetXInvestor as their financial institution inside Quicken

2. User ID Format

- When entering their user ID, clients should enter **5cr** in front of their existing ID
- **Important:** No spaces between 5cr and the user ID
- Example: If the user ID is johnsmith, they should enter 5crjohnsmith

3. Security Settings in NetXInvestor

- Clients may need to approve Quicken within their **Security Settings**



The screenshot shows the 'Security Settings' page for the 'Quicken' institution. At the top, there are tabs for 'All Settings', 'Security Settings' (which is selected and highlighted in blue), 'Display Settings', and 'e-Delivery Preferences'. The main section is titled 'Security Settings' and contains a sub-section for 'Quicken'. A message states: 'Manage and update your account settings and information.' Below this, a green success message box displays: 'Device status updated successfully.' The 'Approved Quicken Device Registration' table lists two devices. The columns are: Device Info, Machine Name, IP address, Created, Expires, and Action. Each device has a 'Delete' button in the Action column.

Device Info	Machine Name	IP address	Created	Expires	Action
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	<input type="button" value="Delete"/>
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	<input type="button" value="Delete"/>

If you need assistance, contact the Cambridge Digital Experience Team at 888-245-0452, and select option 2.

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