

# YOUR STEP-BY-STEP GUIDE TO LINK AQILLA TO YOUR FINANCIAL INSTITUTION

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## To connect your Financial Institution

Before you start, please make sure that your Bank Account Number and Sort Code are correct in Aqilla

Select 'Configuration' > 'Online Financial Institution' > 'Add new'

A new window will open 'Add a New Financial Institution'

Fill in all fields and click 'Save'

Now you have created the Financial Institution reference in Aqilla

## Next, establish the connection by

Click on 'Link' to configure the online connection to your Financial Institution

A new window will open

Select how far back you want to import your transactions on the 'Import Transactions From' field. **Once entered, this cannot be changed**

Next click 'Authorise and Establish Permanent Link' to authorise Plaid and Aqilla to retrieve your Account Details and Transactions

## Then select which Financial Institution you wish to connect

Select the name on the list, then click 'Continue'

A new window will display the login screen to your Financial Institution\*

After successfully logging in you will see a message 'Your Account has been successfully linked to Aqilla'

## Success! Your account has now been linked

Click 'Continue' to finish the process\*

Next to your Financial Institution name it will say 'Linked' and the 'Integration Status' will say 'Configured'

### Online Financial Institutions



+ Add New

A screenshot of a web form titled "Add New Financial Institution". It contains several input fields: "Name" (with placeholder "Name of the institution"), "Code" (with placeholder "Code for the institution"), "Country Code" (a dropdown menu showing "GB - United Kingdom"), and "Description" (with placeholder "This login is using the Jim's login"). At the bottom right, there are two buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon).

A screenshot of a confirmation dialog box titled "Financial Institution Online Link". It contains a paragraph of text explaining the authorization process for linking Aqilla to an HSBC account. Below the text is a checkbox labeled "Please tick this box to confirm you understand this" and a date field "Import transactions from: 15 Feb 2022". At the bottom, there are two buttons: "Authorise and Establish Permanent Link" (with a green checkmark icon) and "Cancel" (with a red X icon).

A screenshot of the Plaid "Select your bank" interface. It shows a search bar at the top and a list of banks with their logos and names: "HSBC (UK) - Personal", "Barclays (UK) - Online Banking: Personal", "Lloyds Bank - Personal", "Santander (UK) - Personal and Business", and "Royal Bank of Scotland - Current Accounts". A "Continue" button is visible at the bottom left of the screen.

If you need further assistance please visit the [Help section](#) on your dashboard.

\*Depending on your Financial Institution and country the process and set up completion time can vary.