

A GUIDE TO PLAID TRANSACTIONS

See More. Know More.

With Plaid Transactions, you can link your outside accounts and see everything in one place—your Primis dashboard. It's secure, easy to use, and built to help you stay on top of your money without the juggling act.

First Things First: What's Plaid?

Plaid is the secure connection that lets you link your accounts from other banks, credit unions, credit cards—even apps like Venmo or PayPal. Once you're linked, you'll see your balances and transactions right alongside your Primis accounts.

Whether you're new or already had accounts linked before, this upgraded experience gives you more control and better visibility.

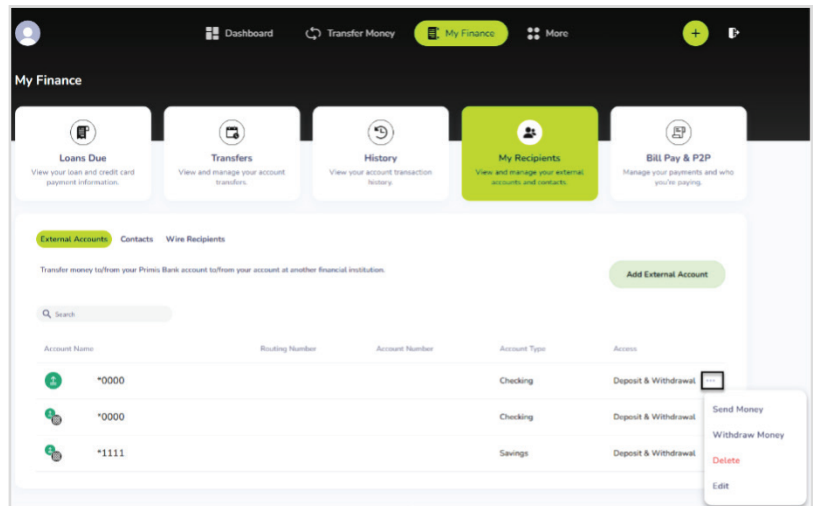
Re-Linking? Start Here First.

If you've previously linked an account, you'll need to delete that old connection before re-linking it.

If you skip this step, you'll get an error that says the account is already linked.

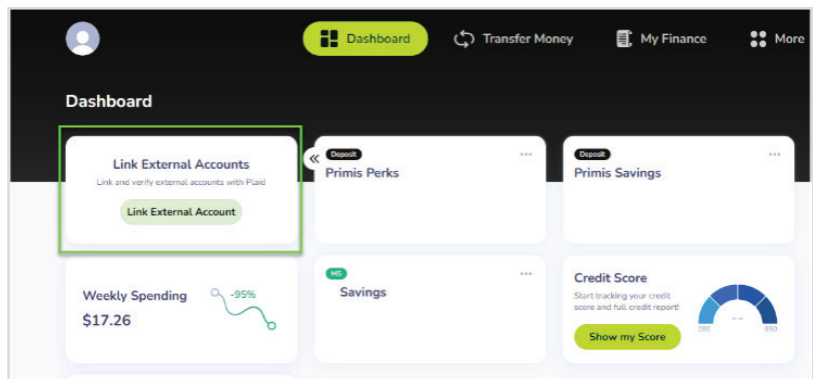
How to Delete an Existing Connection:

1. Log into online banking
2. Go to **My Finance**
3. Click **My Recipients**
4. Find your external account
5. Click the three dots next to it and select **Delete**



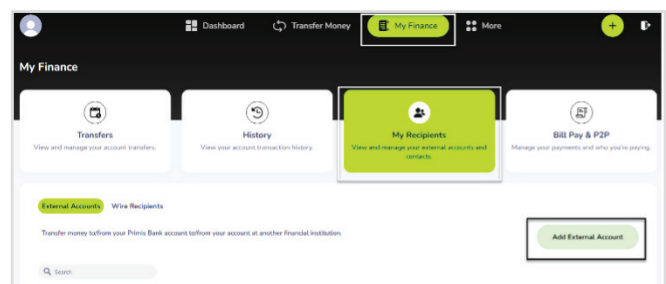
How to Link External Accounts (via Plaid)

1. From your **Dashboard**, click **Link External Account**



Alternatively, you can click **My Finance > My Recipients**

3. Click **Add External Account**
4. Follow the prompts to connect your accounts via Plaid
5. Choose your financial institution, log in securely, and you're all set.



Pro Tips

- Your linked account data refreshes automatically
- You can refresh manually if you need to
- Turn on notifications to get alerts for Primis accounts

Need a hand?

We've got your back.

Call **833.477.4647** or email **digitalcustomercare@primisbank.com**.