SouthernBank

Reference Guide: Managing Plaid Connection

Purpose

Disconnect your current Southern Bank connection in Plaid, reconnect using your **Southern Bank Digital** login, and manage the new connection in the **Plaid Portal.**

Disconnect your current connection

1. Click the **Financial Accounts** button and **unenroll** your existing Southern Bank accounts.
2. You will be told you have no connections. Click **Add Account.**

Add Southern Bank Digital

1. Enter your **phone number.** Plaid sends you a code to verify it.
2. Type in the code and click **Continue.**
3. In the institution search box, enter **Southern Bank.**
4. Click **Southern Bank.** You will see that multiple are available. Choose the one that **does not say Business Pro.**
5. Click **Continue** to log in.
6. Enter your **Southern Bank Digital** credentials and password.

Finish the connection

1. After you log in, your Southern Bank accounts will populate. Click **Continue.**
2. You will see that your accounts are being connected to the **Plaid Portal.**
3. A pop-up asks if you want to add Southern Bank data to Plaid. Click **Add account.**
4. You can now manage the connection in the **Plaid Portal** and view your Southern Bank accounts there.

Choosing the right Southern Bank

When you search for Southern Bank, more than one option appears. Select the one that does **not** say **Business Pro.** Then continue to log in with your Southern Bank Digital credentials.

Quick Tips

Disconnect first
Unenroll your existing Southern Bank accounts before adding the new connection.

Keep your phone handy
Plaid sends a verification code to the number you enter.

Skip Business Pro
Choose the Southern Bank option that does not say Business Pro.

Manage it in Plaid Portal
Once connected, view your Southern Bank accounts and manage the connection in the Plaid Portal.

If you have any questions, contact our Customer Care Center:
1-855-275-7226 opt 3
Email: customercare@southernbank.com