

# Quicken for Mac

## Instructions to Enable Direct Connect

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*Web Connect to Direct Connect*

### Introduction

As Community Bank & Trust completes its launch of Direct Connect functionality with Personal Online Banking, you have the **option** to improve your account's One-Step Update connection type from Express Web Connect to Direct Connect.

Use of Direct Connect is optional - you may continue to use either Express Web Connect or Web Connect (both of these methods of updating transactions will remain available).

To complete these instructions, you will need your User ID and Password for Personal Online Banking.

You should perform the following instructions exactly as described and in the order presented. This change should take 10 minutes or less.

*Thank you for making these important changes!*

### Documentation and Procedures

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**Task 1:** Update Connection Type to Direct Connect.

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1. Select your account in the **Accounts** list on the left sidebar.
1. Choose **Accounts** menu > **Settings**.
2. Select **Set up transaction download**.
3. Enter **Community BT – Waterloo-Personal** in the **Search** field, select the institution name in the **Results** list and click **Continue**.
4. Enter your Direct Connect **User ID** and **Password** and click **Continue**.
5. If the bank requires extra information, enter it to continue.

**NOTE:** Select "Direct Connect" for the "Connection Type" if prompted.

6. In the "**Accounts Found**" screen, associate each new account to accounts in your Quicken data file. Under the **Action** column, select "**Link**" to pick your existing account. When complete, click **Finish**.

**IMPORTANT:** Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.