

# Quicken for Windows

## Instructions to Enable Direct Connect

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*Web Connect to Direct Connect*

### Introduction

Within 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 Transaction Download type to Direct Connect.

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1. Within Quicken, click on **Tools > Account List**.
2. Within the **Account List** menu, identify your **Community BT – Waterloo-Personal** personal account(s).
3. For any **Community BT – Waterloo-Personal** account listed, click **(Improve Connection)** link for the Transaction Download.
4. Within the Activate One Step Update menu, provide your Personal Online Banking **User ID** and **Password**. Select the **Save this password** checkbox. Click on **Connect** when complete.
5. Repeat steps for each account to be enabled for Direct Connect.