

Quicken for Mac Instructions

Direct Connect

Documentation and Procedures

Connect Accounts to *Brighton Bank - DC*

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter *Brighton Bank - DC* in the **Search** field, select the institution name in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User Id** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

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

7. In the **"Accounts Found"** screen, associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select **"Link"** to pick your existing account.

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

8. Select **Finish**.