

QuickBooks for Mac Instructions

Direct Connect

1. Choose **Banking** menu > **Online Banking Setup**.
2. Enter, then select **Congressional FCU** from the **Financial Institution** list. Click **Next**.
3. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
4. The Online Banking Assistant window displays during setup. Select **Yes, my account has been activated for QuickBooks online services**, then click **Next**.
5. Enter credentials and click **Sign In**.
6. For each account you wish to download into QuickBooks, click **Select an Account to connect to the appropriate existing account register**.

IMPORTANT:

Do **NOT** select "**New**" under the action column.

7. Click **Next**, then **Done**.
8. Add or match all downloaded transactions in the Downloaded Transactions window.