Quicken for Windows Instructions

Direct Connect

1. Choose **Tools** menu > **Account List**.

2. Click the **Edit** button of the account you want to activate.

3. In the **Account Details** dialog, click the **Online Services** tab.

4. Click **Set up Now**.

5. Use **Advanced Setup** to activate your account.

6. Enter *Congressional FCU* in the search field, select the name in the list and click **Next**.

7. If presented with the Select Connection Method screen, select **Direct Connect**.

8. Type your **Member ID** and **Password** and click **Connect**.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link** to an existing account and select the matching accounts in the drop-down menu.

10. Do NOT choose **Add to Quicken** unless you want to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don't Download into Quicken**.

11. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.

12. Click **Done** or **Finish**.