

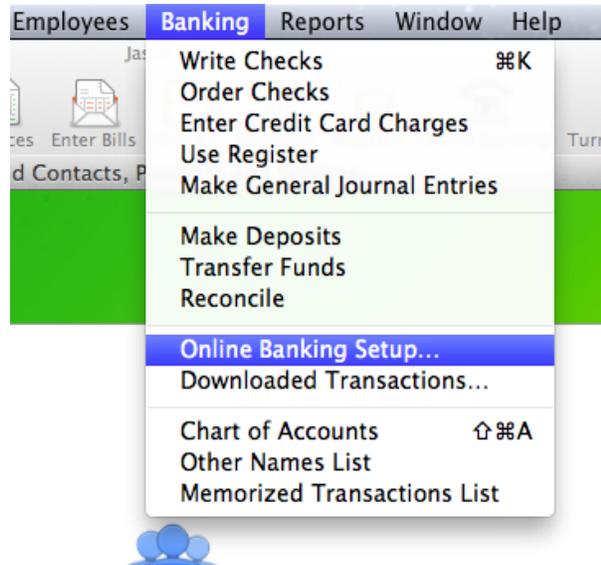
QuickBooks for Mac Getting Started Instructions

QuickBooks for Mac Direct Connect

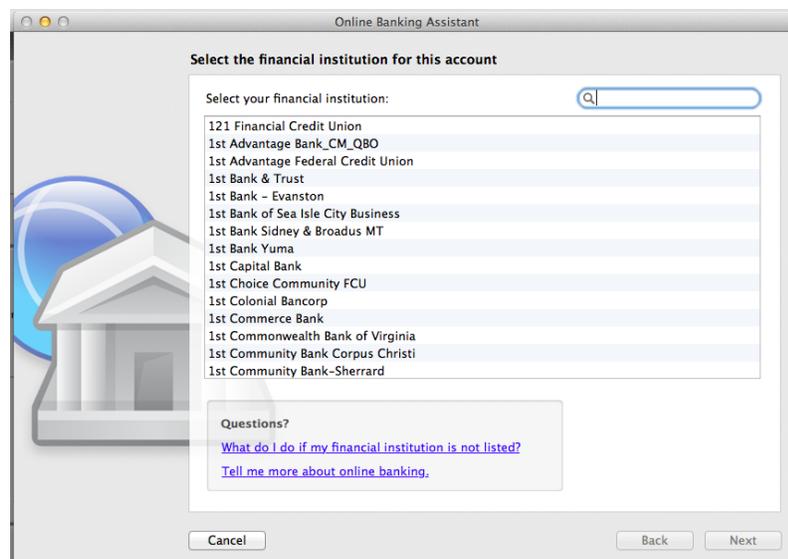
Documentation and Procedures

Task 1: Connecting to Sound Credit Union Direct Connect

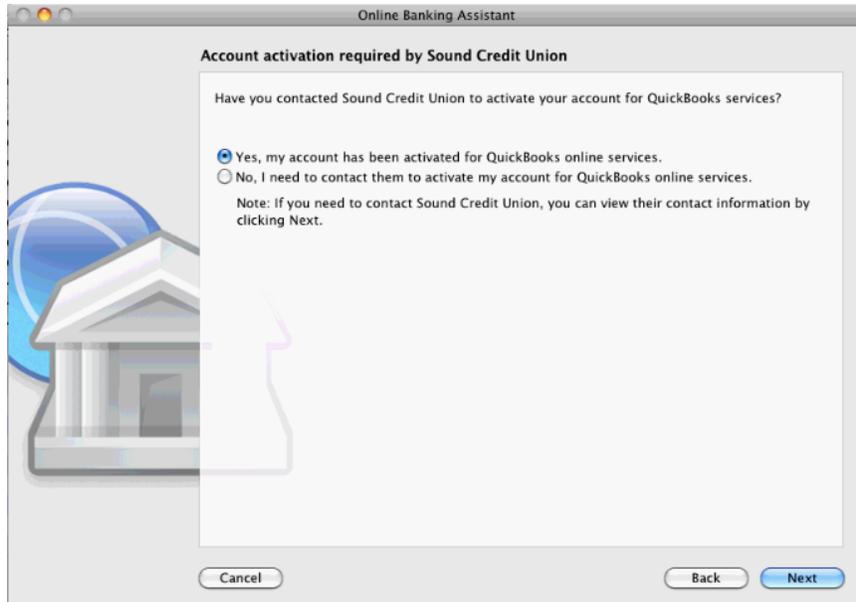
1. After logging into QuickBooks, Choose Banking menu → Online Banking Setup...



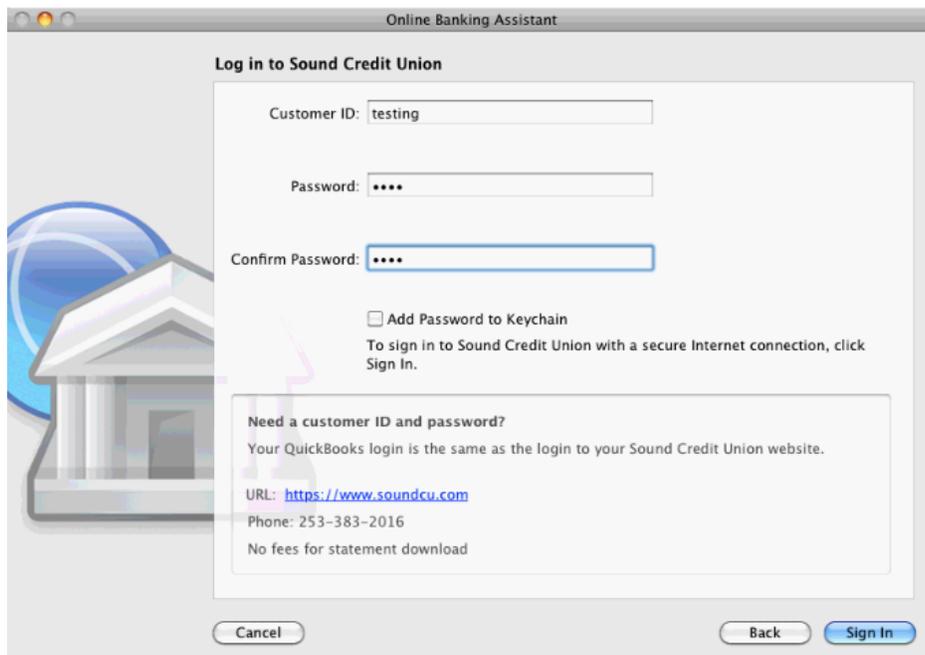
2. Type 'Sound CU' into the Search Box for the Financial Institution name. It will display the results, click on Sound CU. **NOTE: Do NOT choose Sound Credit Union—it's for Web Connect, which is being phased out.**



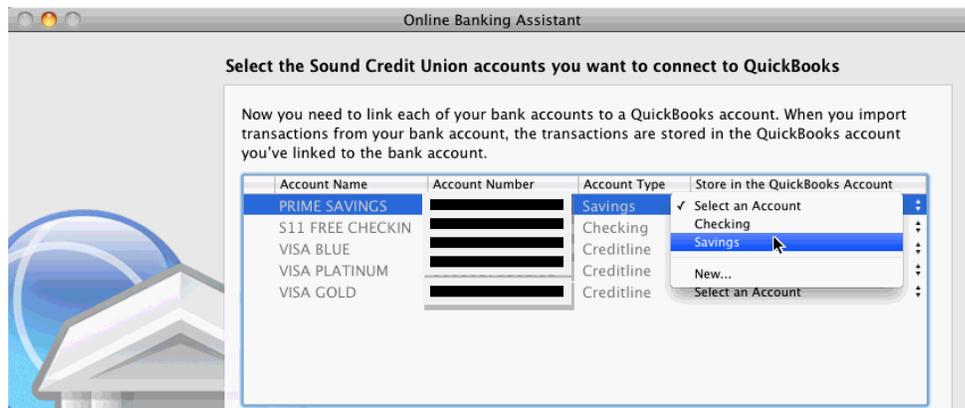
3. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
4. The Online Banking Assistant window displays during setup. Select **Yes, my account has been activated for QuickBooks online services**, then click **Next**.



5. Enter your Sound Online Banking credentials and click **Sign In**.



6. For each account you wish to download into QuickBooks, click **Select an Account**.



7. Click **Next**.
8. Click **Done**.