

# Quicken for Mac Getting Started Instructions

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*Quicken Essentials for Mac Direct Connect*

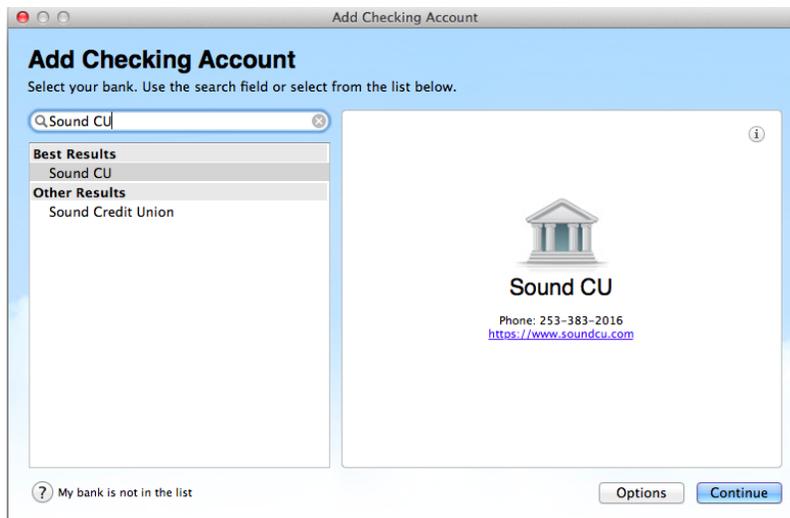
## Documentation and Procedures

### Task 1: Connecting to Sound Credit Union Direct Connect

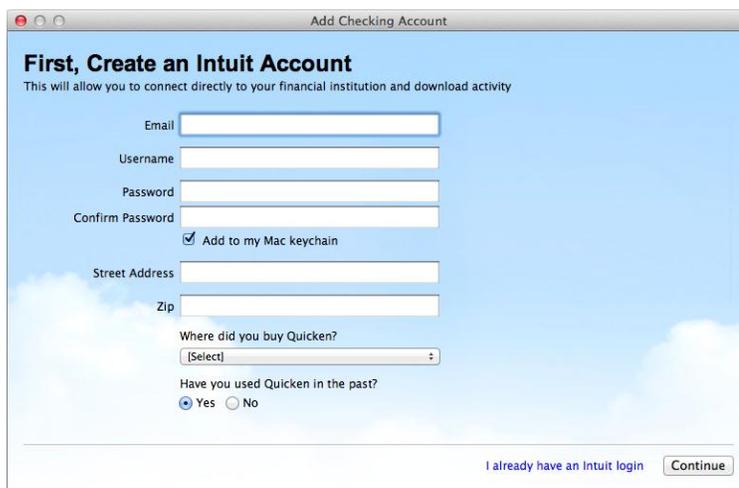
1. Login to Quicken and click on **Accounts** → **New** → **Checking**.



2. Type 'Sound CU' into the search box for the bank name. Then click Sound CU in the results. **NOTE: Do NOT choose Sound Credit Union—it's for Web Connect, which is being phased out.**



3. It will then ask you to create an Intuit account or log in if you already have an account.

A screenshot of the 'First, Create an Intuit Account' dialog box in Quicken. The form asks for Email, Username, Password, Confirm Password, Street Address, Zip, and Where did you buy Quicken? It also has a checkbox for 'Add to my Mac keychain' and radio buttons for 'Have you used Quicken in the past?'. There is a link for 'I already have an Intuit login' and a 'Continue' button at the bottom right.

- You will use the same login here that you use at SoundCU.com for online banking or mobile banking.

**Add Checking Account**

**Enter Login Information for Sound CU**  
This will allow you to connect directly to your bank and download activity.

Customer ID:

Password/PIN:

Add Password to Keychain

Protecting your financial information is absolutely critical to us. Learn more about security.

Cancel Continue

- Once the loading bar disappears, the accounts that are added will display.

**Add Checking Account**

**5 Accounts Found**  
Add or link the accounts you would like added to Quicken.

Account Name & Description	Type	Action	Quicken Account Name
Savings: [REDACTED] PRIME SAVINGS	Savings	Add	Savings
Checking [REDACTED] S11 FREE CHECKIN	Checking	Add	Checking
Line of Credit [REDACTED] VISA BLUE	Line of Credit	Add	Line of Credit
Line of Credit [REDACTED] VISA PLATINUM	Line of Credit	Add	Line of Credit 2
Line of Credit [REDACTED] VISA GOLD	Line of Credit	Add	Line of Credit 3

Cancel Continue

- You will now see your accounts in Quicken!

