

## Quicken for Windows Getting Started Instructions

Quicken Direct Connect



## **Documentation and Procedures**

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

1. After logging into Quicken, click on **Tools**  $\rightarrow$  **Add Account.** 



2. Next, select Checking, Savings or Credit Card depending on which accounts you would like to add. If you have multiple accounts, such as Checking and Savings, you can simply choose Checking and it will add the other accounts as well.



 Enter 'Sound CU' as the name of the bank. Then click Sound CU in the results. NOTE: Do NOT choose Sound Credit Union-it's for Web Connect, which is being phased out.





4. Login using your Sound Online Banking User ID and Password.

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Add Checking Account	
Sound CU WEB: www.soundcu.com   TEL: 253-383-2016	
Login for your Sound CU account	Your credentials are safe with Quicken
Password for your Sound CU account	We use bank-level encryption to secure your login credentials, they cannot be compromised Learn more about our security
Save this password	

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



6. You will now see your accounts on the left hand side in Quicken!

