Quicken for Mac
Instructions to Enable Direct Connect

Web Connect to Direct Connect

Introduction

With Cedar Rapids Bank & Trust's addition of the Direct Connect functionality within both Personal Online Banking and Business Online Banking, you have the **option** to improve your account's One-Step Update connection type from Express Web Connect to Direct Connect.

Use of Direct Connect is optional - you may continue to use either Express Web Connect or Web Connect (both of these methods of updating transactions will remain available).

To complete these instructions, you will need your User ID and Password.

You should perform the following instructions exactly as described and in the order presented. This change should take 10 minutes or less.

Thank you for making these important changes!

Documentation and Procedures

Task 1: Update Connection Type to Direct Connect.

1. Select your account in the Accounts list on the left sidebar.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download.**
4. If using Personal Online Banking, enter ***Cedar Rapids Bank & Trust - Retail*** in the **Search** field. If using Business Online Banking, enter ***Cedar Rapids Bank & Trust - Business*** in the **Search** field, Select the institution name and account in the **Results** list and click **Continue**.
5. Enter your Direct Connect **User ID** and **Password** and click **Continue**.
6. If the bank requires extra information, enter it to continue.

NOTE: Select "Direct Connect" for the "Connection Type" if prompted.

6. In the "**Accounts Found**" screen, associate each new account to accounts in your Quicken data file. Under the **Action** column, select "**Link"** to pick your existing account. When complete, click Finish.

IMPORTANT: Do **NOT** select "**ADD**" under the action column unless you intend to add a new account to Quicken.