

Quicken for Windows Instructions

Direct Connect

1. Enroll in the new MoneyView online banking at www.pvfcu.org. All members will re-enroll.
2. In Quicken, choose **Tools** menu > **Account List**.
3. Click the **Edit** button of the account you want to activate.
4. In the **Account Details** dialog, click the **Online Services** tab.
5. Click **Set up Now**.
6. Use **Advanced Setup** to activate your account.
7. Enter Park View FCU in the search field, select the name in the list and click **Next**.
8. If presented with the Select Connection Method screen, select **Direct Connect**.
9. Type your Direct Connect **User ID** and **Password** and click **Connect**.
10. 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.
11. 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**.
12. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
13. Click **Done** or **Finish**.