



# Quicken for Mac

Switching from Direct Connect to Web Connect

## **About the switchover**

As Consumers Credit Union completes its Online Banking switchover, you will need to modify your Quicken settings to ensure the seamless transition of your data. Please reference the dates next to each task as this information is time sensitive.

To complete these instructions, you will need your login credentials for Online Banking.

Please follow the steps below exactly as described, as otherwise your Online banking connectivity may stop functioning properly. This conversion should take 15–30 minutes.

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## **Step 1: Conversion Preparation**

1. Backup your data file. Go to **File > Save a Backup**.
2. Download the latest Quicken Update. Go to **Quicken > Check for Updates**.

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## **Step 2: *Optional task* – Complete a final download *before 4 p.m. EST, 10/10/19***

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Repeat this step for each account (such as checking, savings, credit cards and brokerage) that you use for Online Banking or investing.

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## **Step 3: Cancel Outstanding Payments *before 4 p.m. EST, 10/10/19***

*If you are not a Bill Pay user within Quicken, skip this Task.*

**IMPORTANT:** This step must be completed to avoid possible duplicate payment. If you do not cancel payments scheduled to be paid **on or after 10/10/19**, these payments may still be processed.

1. Highlight a Bill Payment transaction on the account register.

**NOTE:** While on the account register, go to **File > Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

2. Click on the **Edit** button located on the action bar at the bottom of the account register window.
3. Click on the **Edit Details** tab located below the highlighted transaction.
4. Click on the **Online Payment** tab.
5. Click on **Cancel Payment**.
6. Repeat steps for each outstanding payment transaction you have with your financial institution.

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#### **Step 4: Disconnect Accounts in Quicken *on or after 10/15/19, 7:00 a.m., EST***

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Troubleshooting > Deactivate Downloads**.
4. Repeat steps for each account to be disconnected.

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#### **Step 5: Reconnect Accounts to Consumers Credit Union *on or after 10/15/19, 7:00 a.m., EST***

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Select **Set up transaction download**.
4. Enter **Consumers Credit Union** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. **Log in** to Online Banking. **Download** a file of your transactions to your computer.

**NOTE:** Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box **Drop download file**.

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

- In the "**Accounts Found**" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link**" to pick your existing account.

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

- Click **Finish**.
- Repeat steps for each account to be reconnected.