



Quicken for Mac

Switching from Direct Connect to Express 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.

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**.

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.

Step 3: Disconnect Accounts in Quicken *on or after 10/15/19*

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.

Step 4: Reconnect Accounts to Consumers Credit Union of Michigan *on or after 10/23/19*

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 of Michigan** in the **Search** field, select the name in the **Results** list and click **Continue**.
5. Enter your **User ID** and **Password**, and click **Continue**.
6. If the financial institution requires, extra information, enter it to continue.

NOTE: Select "Express Web Connect" or "Quicken Connect" for the "Connection Type" if prompted.

7. 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.

8. Select **Finish**.