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Quicken for Windows

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.

Step 1: Conversion Preparation

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

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

1. Choose **Tools** menu > **One Step Update.**
2. Depending on how you manage your passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now.**
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE: If you need assistance matching transactions, choose **Help menu > Quicken Help.** Search for **Matching Transactions** and follow the instructions.

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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. Choose **Tools** menu > **Online Center.**
2. Select **Consumers Credit Union** from the **Financial Institution** drop-down list.
3. On the **Payments** tab, select an account from which a payment is scheduled in the future.

NOTE: Click **Print** to save your list of pending payments. You can use this when you recreate and send these payments later.

4. In the payment status list, you will cancel payments for each payee with a status that is schedule for delivery on a date **after 10/10/19.** To do this, select the first payee and click **Cancel Payment.**
5. Perform steps 3 & 4 for all payments scheduled for delivery on a date **after 10/10/19.**
6. On the toolbar, choose **Repeating.**
7. Select a payment instruction and click **Delete.** You will need to click **Delete** again in a confirmation window.
8. Repeat step 7 for each repeating payment instruction you have with your financial institution.

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

1. Choose **Tools** menu > **Account List.**
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. 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. Download your Quicken Web Connect file from Consumers Credit Union.

NOTE: Take note of the date you last had a successful connection in your Quicken account. If you have overlapping dates in the Web Connect download, you may end up with duplicate transactions.

2. Click **File** > **File Import** > **Web Connect File.** Locate and select the Web Connect file to import.
3. **Import Downloaded Transactions** window opens: Select **Link to an existing account** and choose the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.

IMPORTANT: Do **NOT** select **Create a new account** unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click **Cancel.**

4. Repeat steps for each account to be reconnected.