



Quicken for Windows

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 > 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.

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

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.

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

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the **Account Details** dialog, click the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **Consumers Credit Union of Michigan** in the search field, select the name in the list and click **Next**.
7. If presented with the **Select Connection Method** screen, select **Express Web Connect**.
8. Enter your **User ID** and **Password**. Click **Connect**.

NOTE: You may be presented with a security question from your financial institutions prior to receiving your accounts.

9. 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 dropdown menu.

IMPORTANT: Do **NOT** select **Add to Quicken** 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**.

10. After all accounts have been matched, click **Next**. You will receive confirmation your accounts have been added.
11. Click **Done** or **Finish**.