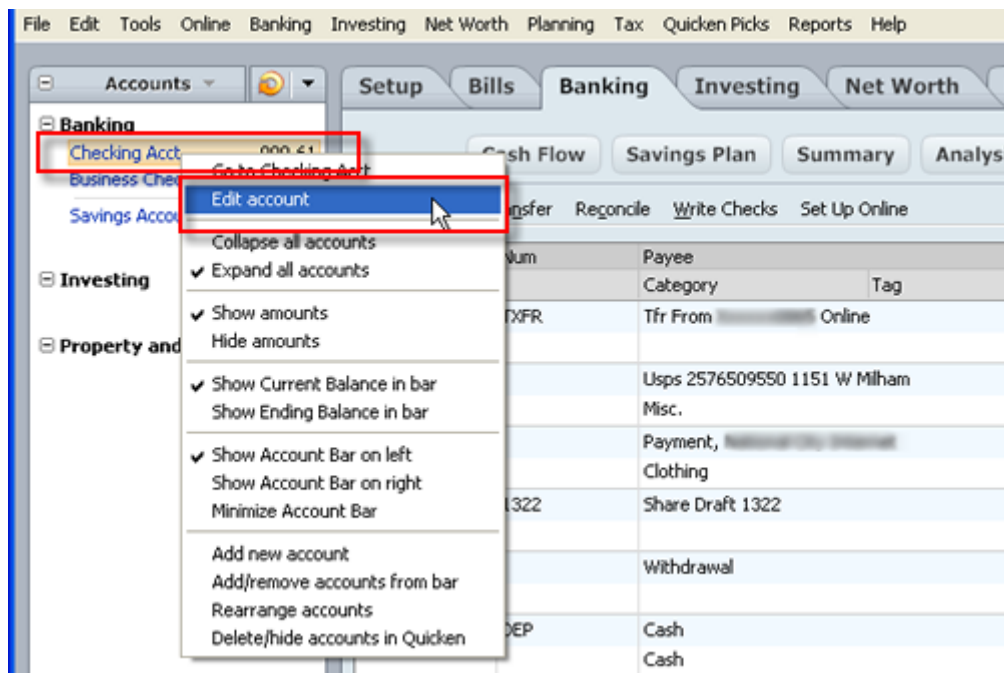


## Quicken Direct Connect Instructions

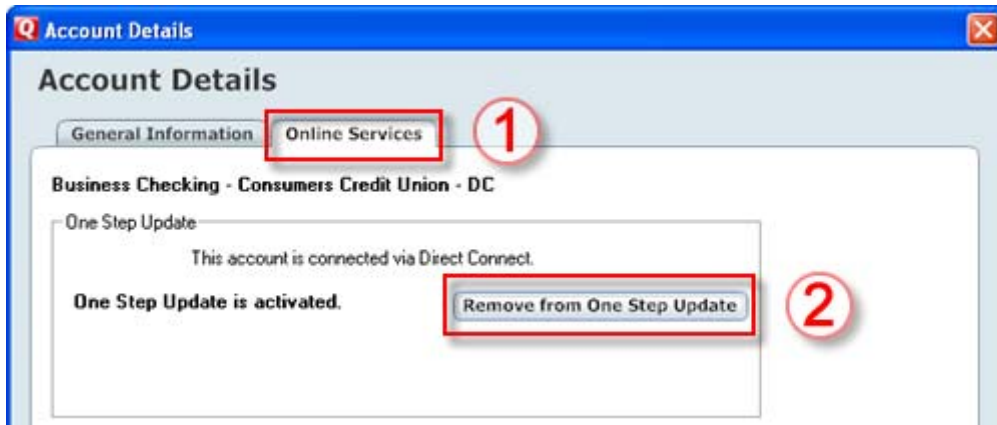
Follow these instructions to set up Direct Connect to download transaction history into Quicken. If your accounts already exist in Quicken, start by removing the previous Direct Connect. You will not be able to link any accounts to the new Direct Connect if they have other connections established. If your accounts do not exist in Quicken, skip to the "Establish Direct Connect" section on page 3.

### Remove all accounts from One Step Update or other connection type

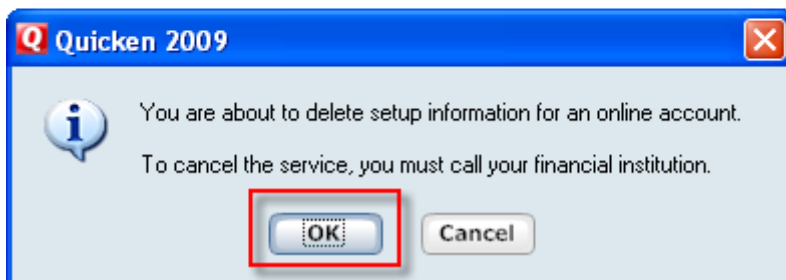
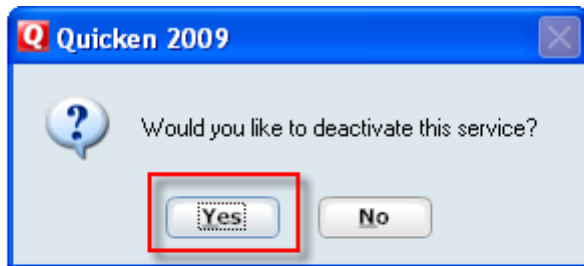
- Right click on account
- Click **Edit account**



1. Click the **Online Services** tab
2. Click **Remove from One Step Update**

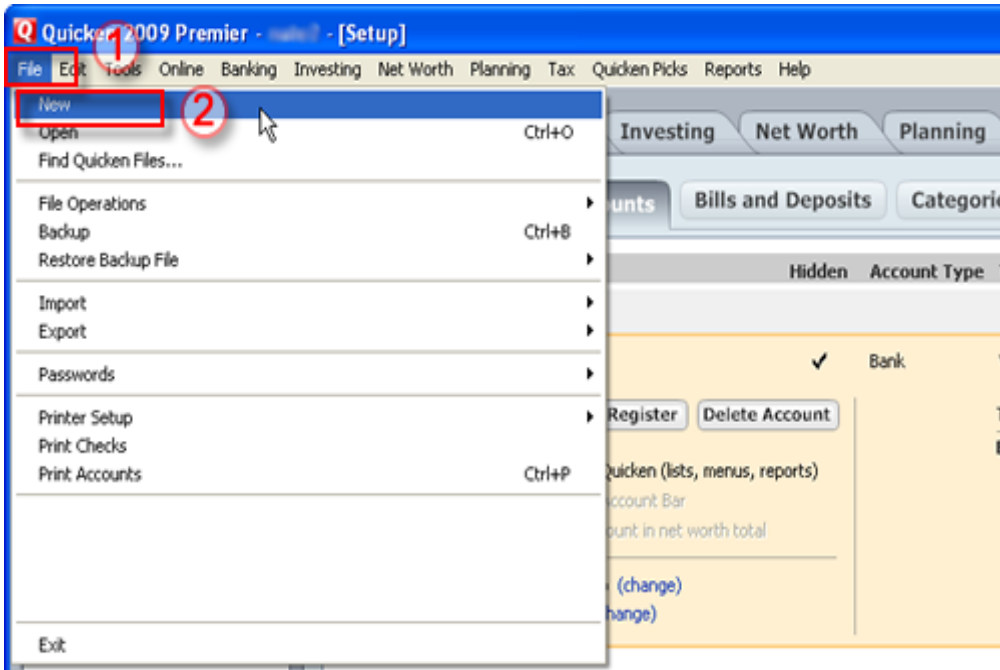


- Click **Yes**
- Click **OK**
- Repeat this step for every Consumers Credit Union account in Quicken

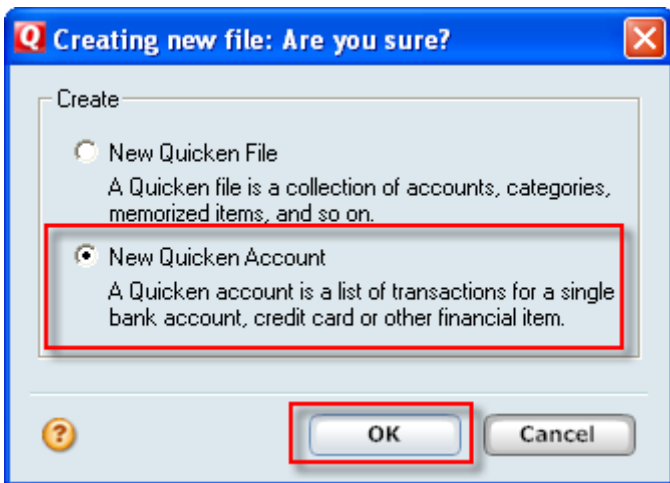


## Establish Direct Connect

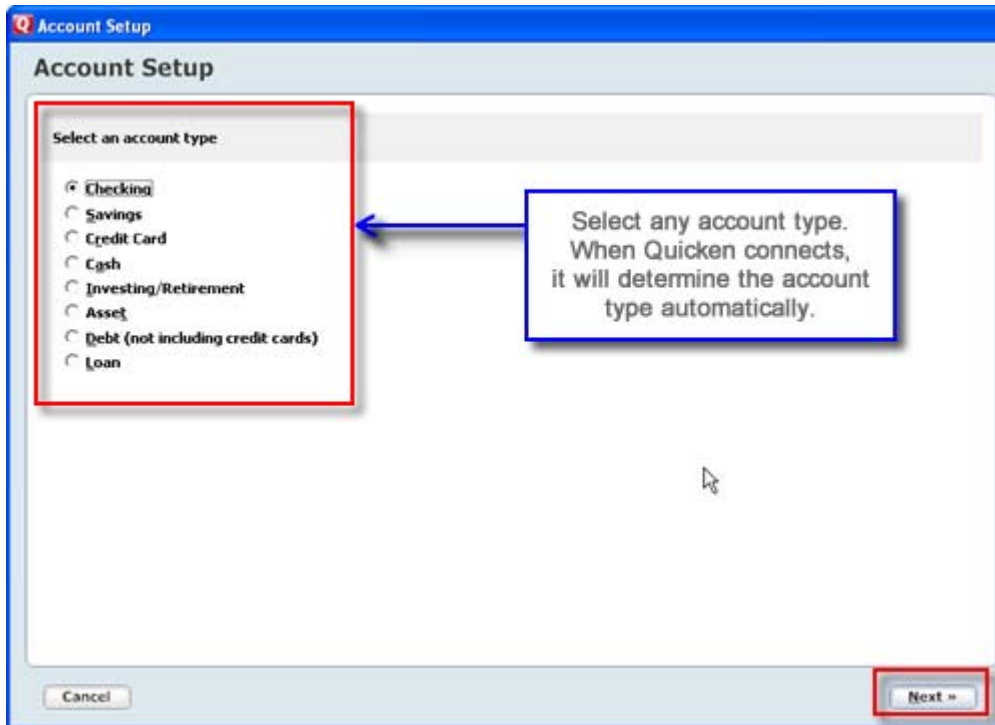
1. Click **File**
2. Click **New**



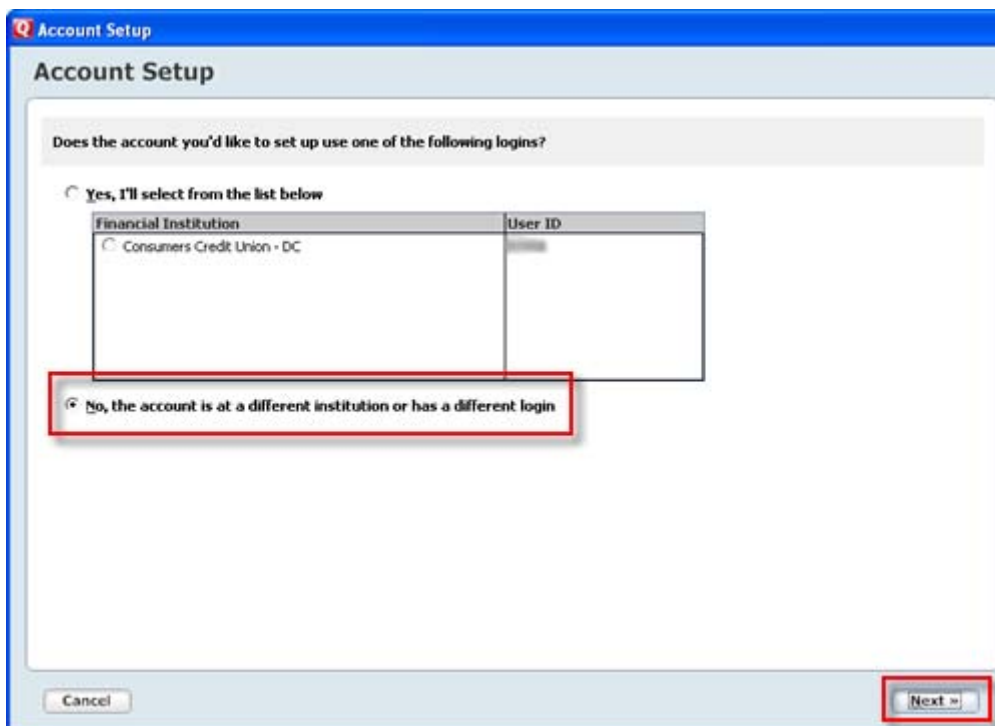
- Click radial button for **New Quicken Account**
- Click **OK**



- Select an account type (This can remain **Checking** and all accounts will still show up)
- Click **Ok**



- Select **No**, the account is at a different institution or has a different login
- Click **Next**



- Enter **Consumers Credit Union - DC** for the name of the financial institution
- Click **Next**

- Choose **Yes, connect to Consumers Credit Union - DC through Quicken**
- Click **Next**

- Enter your **Member Number**
- Enter your **Online Banking password**
- Re-enter your **Online Banking password** to confirm
- Click **Next**

**Account Setup**

**Transaction download available!**  
This allows you to get information from your bank without leaving Quicken.

**Log in to enable transaction download in Quicken**

**Log in using my Consumers Credit Union - DC ID and Password**

Consumers Credit Union - DC User ID / username  
Consumers Credit Union - DC password  
Reenter password

**Consumers Credit Union - DC**  
• Your Quicken login is the same as your login to the Consumers Credit Union - DC Web site.

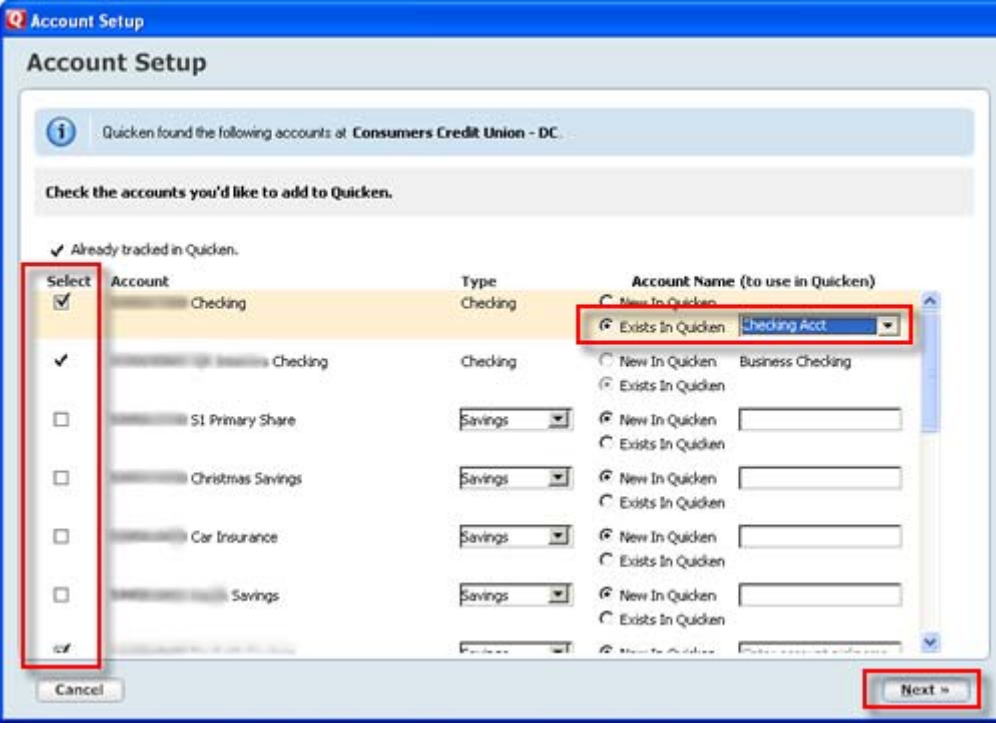
**Enter your Member Number and Online Banking Password**

**Your password and data are secure.** Find out how Quicken protects you.

**I do not have a Consumers Credit Union - DC user name and password**  
(I have never logged in to my Consumers Credit Union - DC web site)

Cancel      < Back      **Next >**

- Select the accounts you would like Quicken to track
- If the account already exists in Quicken, Click **Exists in Quicken** and Select the account from the drop down menu.
- Click **Next**, it will take several minutes to update and retrieve your account information



- Choose to store your Online Banking password in the Password Vault
- Click **Next**
- Click **Done** and you are finished