

## How to refresh Online Banking Services for a Quicken Windows account

Deactivating an account's online banking service permanently removes it from One Step Update. In certain cases you'll need to deactivate an online banking service that uses a specific connection method and then reactivate using a different connection method in order to use specific online banking service providers. Additional help that compares the different connection methods is available.

**Note:** If you have an investment account that is linked to a cash account, you need to deactivate the online services from the investment account first. When the online services are deactivated for the investment account, online services for the linked cash account are deactivated simultaneously.

### Deactivating an account from Online Banking

1. Select the **Tools** menu and *click* on **Account List**. The **Account List** window will be displayed.
2. Select the account for which you want to deactivate online services and then *click* **Edit**. The **Account Details** window will now be displayed.
3. *Click* the **Online Services** tab.
4. *Click* **Deactivate** (Remove from One Step Update in older versions) next to the service you want to disable.
5. *Click* **Yes** to the message asking if you want to disable this service.
6. *Click* **OK** to the confirmation message. The **Account Details** window is refreshed, and the service is listed as **Available**.
7. *Click* on the **General** tab and delete the information displayed in the **Financial Institution & Account Number** field.
8. *Click* the **OK** button.

### What if Quicken tells me to accept downloaded transactions before deactivating online services?

Quicken will not deactivate online services if you have not accepted all downloaded transactions. Verify that you have accepted all transactions.

1. Open the account register and select the **Downloaded Transactions** tab at the bottom of the register. If there are not any transactions listed, skip to step 3.
2. Accept all transactions and then follow the steps above to deactivate online services.
3. Select the **Online** menu and select **Online Center**.
4. Select the appropriate financial institution and account.
5. Select Transactions.
  - a. If transactions are listed, *click* **Compare to Register** and accept the transactions.
  - b. If no transactions are listed or **Compare to Register** does not allow you to accept the transactions, additional information is available on the Quicken support site.

Once an account has been successfully deactivated, follow the next steps to re-activate the account:

## Activate a Quicken account for Online Banking

1. Select the **Tools** menu and select **Account List**. The **Account List** window is displayed.
2. Select the account for which you want to deactivate online services and then *click* **Edit**. The **Account Details** window will be displayed.
3. *Click* the **Online Services** tab.
4. *Click* the **Set up now** button. The financial institution listing will appear
5. *Type* the name of your financial institution so Quicken searches for it.
6. Follow the rest of the prompts.
7. Once all steps are completed the account should be activated for online banking.

### If you receive error messages while activating an account...

If any error messages are displayed while activating an account, please note them and inform your financial institution of the errors received. In addition to that, please collect the necessary Online Banking log files and submit them to your financial institution for analysis. Please refer to the following Quicken Support article to find the Online Banking log files: [How To Access Online Banking Log Files in Quicken For Windows](http://quicken.intuit.com/support/help/features-and-tools/how-to-access-online-banking-log-files-in-quicken-for-windows).

**URL:** <http://quicken.intuit.com/support/help/features-and-tools/how-to-access-online-banking-log-files-in-quicken-for-windows/GEN82138.html>