Quicken Instructions

This document contains instructions to assist with disconnecting and reconnecting Quicken. Included for both Windows and Mac.

If additional assistance is needed, please contact Intuit directly quickinfo@intuit.com.

To navigate this document, just click the link or links below that match your product and connectivity:

Instructions for Downloading a Web Connect file from your Online Banking Site

IMPORTANT: If you currently use Direct Connect in Quicken to initiate Bill Payments, please complete the additional tasks at the link below. If you do not use Direct Connect Bill Pay or you only initiate Bill Payments from within your online banking site, these additional tasks are not required.

Quicken Windows Web Connect

Disconnect online banking connection for accountsChoose **Tools> Account List**.

1. Click **Edit** on the account to deactivate.
2. In Account Details, click **Online Services**.
3. Click **Deactivate**. Follow prompts to confirm deactivation.
4. Click the **General** tab.
5. Delete Financial Institution and Account Number information.
6. Click **OK** to close window.
7. Repeat steps for any additional accounts.

Reconnect online banking connection for accounts:

1. Download a Quicken Web Connect file from your financial institution's online banking site.
2. In Quicken, choose **File > File Import > Web Connect (.QFX) File**.
3. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
4. Choose **Link to an existing account**. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
5. Repeat this step for each account you have connected to this institution.

Quicken Mac Web Connect

Activate online banking connection for accounts:

1. Select your account under the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter your financial institution name in the search field, select the correct option and click **Continue**.
5. Log into your financial institutions online banking site and download your transactions to your computer.

   Important: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web 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, click **Link** to pick your existing account.

   Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.
8. Click **Finish**.

Quicken Windows Bill Pay

Cancel Existing Bill Payments.

1. Choose **Tools > Online Center.**
2. Choose your institution from the Financial Institution drop-down list.
3. On the Payments tab, choose an account from which a payment is scheduled in the future.
4. In the payments status list, you will cancel payments for each payee with a status that is scheduled for delivery on a date. after the 1st Action Date. To do this, select the first payee and click **Cancel Payment**.
5. Repeat steps 3 & 4 for all payments that are scheduled for delivery after the 1st Action Date.
6. On the toolbar, click **Repeating**.
7. Choose a payment instruction and click **Delete**. Click **Delete** again in the confirmation window.
8. Repeat step 7 for each repeating payment you have with your financial institution.

Re-create Your Bill Payments.

If you need help re-creating payments, choose **Help > Quicken Help**. Search for **Create an online Payment** and follow the instructions to create and transmit an online payment.

Quicken Mac Bill Pay

Cancel Existing Bill Payments.

1. Highlight a Bill Payment transaction on the account register.
2. While on the account register, choose **File > Print** to save your list of pending payments. You can use this when you re-create the bill payments and send these payments again.
3. Click **Edit** at the bottom of the account register window.
4. Click **Edit Details** below the highlighted transaction.
5. Click the Online Payment tab and choose **Cancel Payment**.
6. Repeat these steps for each outstanding Bill Payment you have scheduled with your financial institution.

Re-create Your Bill Payments.

For assistance with re-creating payments, choose **Help** and search for **Adding online Bill Pay transactions**. Follow the instructions to create and transmit an online payment.