

Prompted to Create New Account Instead of Using Existing Account for Online Services

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If the account you want to update already exists in Quicken but you can't select it when importing, Quicken does not recognize the account you are updating. The most common symptoms of this problem are that the Use an Existing Quicken account option is grayed out or the account you want to use does not appear in the drop down list. The procedure below shows how to resolve this issue.

1. [Deactivate the online functions of the account](#) for the account you want to update.
2. Visit your financial institution's Web site, and then click the link on that site to download your Web Connect data into Quicken.
3. [Re-activate the account](#).
4. Click **Use an existing Quicken account**, and then choose the account from the list provided.
5. Click the **Continue** button. your recent account history will be transmitted from your financial institution to your Quicken software.
6. Once the transmission is complete, Quicken will open the Online Center or Online Update Summary. Click **Compare to Register** or **Go to Register**. At this window, you can accept your recently downloaded transactions into your Quicken register.

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1) Deactivate Online Banking Services for a Quicken Account

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Deactivating an account's online banking service permanently removes it from One Step Update (unless you later reactivate). 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 payment 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. When the online services are deactivated for the investment account, online services for the linked cash account are also deactivated.

1. Select the **Tools** menu and select **Account List**. The Account List window opens.
2. Select the account for which you want to deactivate online services, and then click **Edit**. The Account Details window opens.
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. **Note:** If you do not receive this message, additional information is available below.
6. Click **OK** to the confirmation message. The Account Details window is refreshed, and the service is listed as Available.
7. Contact your financial institution to cancel the online services.

Note: If your financial institution charges a fee for online services in Quicken, you need to cancel the services by contacting your financial institution. Deactivating the account in Quicken will not normally stop the service fee.

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**.
 1. If transactions are listed, click **Compare to Register** and accept the transactions.
 2. If no transactions are listed or Compare to Register does not allow you to accept the transactions, [additional information](#) is available on the support site.

3)Activating an Account For Online Services

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To use the online financial services in the Quicken program, you need to activate your Quicken accounts using the information supplied by your financial institution. If you have not already done so, apply for online services from your financial institution, and then follow the steps below to activate your account. You either can activate an existing account or set up a new online account.

The first time you download from your institution, the complete transaction history from their site is downloaded. The number of transactions downloaded is determined by the institution.

Note: If an OL error message occurs when activating online services in Quicken, resolve the error by using the exact OL error number to search our Support site and/or by following our [Online Troubleshooting Guide](#).

Activate an Existing Quicken Account for Online Access

From the Account List, click Activate Downloads and follow the steps to enable the account and do the first download. Follow these steps:

1. From the **Tools** menu select **Account List**. If you've already entered a financial institution, you can activate transaction downloads from the Account List (if supported by the Financial Institution). If not, or if the FI is not correct, follow the next step.
2. Select the account to activate, and click **Edit** at the top of the window.
3. In the **Financial Institution** field, begin typing the name of the financial institution to download from.
Note: The names of the available financial institutions appear automatically as you type.
4. Click the **Online Services** tab.
5. Click **Activate** next to the service you want to use.
6. Follow the on-screen instructions to enter the information provided by your financial institution.

Note:

- You may be offered the opportunity to activate additional accounts with your financial institution.
- If you have more than 6 accounts with 1 financial institution, only the first 6 accounts found during the "discovery phase" will be displayed on the Select Accounts summary window. Complete this window for the first 6 accounts, then repeat the setup process to setup the remaining number of accounts.
- You must download transactions for Web connect accounts from the financial institution's Web site. If your financial institution requires that you use Web connect to download transactions, the Web site may open a browser window in Quicken with instructions for how to complete the activation. You'll be brought to a screen that

explains Web Connect. Click **Go There Now**. The account is not activated until the you find the Web Connect file at the website, download it and import it into Quicken.

Once you have successfully completed this process, **Activated** appears in the Online Services column in the Account List window.

When the download is complete, the account history appears in your register. Accept each transaction and categorize each one appropriately. You have the option to "Accept All" if you like.

Compare the downloaded transactions with your account register. You need to match your downloaded transactions.

- If the selected transaction is not currently marked as Matched, but should be matched to one or more transactions already in your Quicken register, click **Edit**, and select **Match Manually**. Quicken opens a window to allow you to select one or more transactions. If you select more than one transaction when manually matching, Quicken enters a split transaction in your account register with a single line for each selected transaction and a line for the difference in amounts, if any.
- If the transaction is matched in error, and may match another transaction, click **Edit**, and select **Unmatch**. Quicken attempts to match the transaction again. If no transactions are close enough, Quicken changes the transaction's status to New.

Create a New Quicken Account for Online Access

Follow these steps:

1. Select the **File** menu and select **New**.
2. Select **New Quicken Account**, and click **OK**.
3. Select the account type, and click **Next**.
4. Enter the **name of the financial institution** to download from, and then click **Next**.
5. To have Quicken automatically set up your account, select the **Yes I want to connect to [financial institution] through Quicken** option, and then click **Next**.
6. Follow the on-screen instructions.