How do I refresh my financial institution information in Quicken?

A profile is maintained for each financial institution that supports online services with Quicken. It defines how your financial institution handles online account access (for example, the format of your password, how online payments are handled, and what website you visit to download transactions).

Quicken checks periodically for updates to this profile. If the profile has changed since Quicken last checked for an update, the profile in Quicken and the new profile will not be the same. When the profile in Quicken isn't the most recent profile available, you'll receive an error message.

If your financial institution has recently merged or made other changes to the online services offered in Quicken you may need to manually update the list Quicken maintains.

1. Choose **Tools** menu > **Online Center**.
2. Select the financial institution you want to update from the **Financial Institution** drop-down menu.
3. While pressing **CTRL+F3** on your keyboard, click **Contact info** at the top of the screen. **You must do all three at the same time**.
4. Select the financial institution you want to update, and click **Refresh**. The branding and profile information will be listed under current status as **needs updating**.
5. Click **OK**.
6. Click **Update/Send**, enter your financial institution **Password**, and select **OK**. Follow any additional instructions.
7. Repeat the steps above for all financial institutions you get the error for.
8. Click **Contact Info** again to review the information.

Note for our Canadian Customers

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
Canada: "Colour" / United States: "Color"
Canada: "Centre" / United States: "Center"
Canada: "Realise" / United States: "Realize"
Canada: "Behaviour" / United States: "Behavior"
Canada: "Analyse" / United States: "Analyze"