Web Connect preferences

If you use **Web Connect**, depending on the services supported by your financial institution, Quicken chooses the best available method to update your transactions and balances. When you use **Web Connect**, you log in to your financial institution's Web site and click a button or link to initiate the download process (often called **Download to Quicken**).

If you use this method to update transactions and balances from your financial institution, you can change settings that determine whether the data is saved as a separate file or entered directly into Quicken, and whether Quicken should stay open or automatically close after receiving the downloaded data.

1. Choose **Edit** menu > **Preferences** > **Web Connect**.
2. In the **Web Connect Options** window, change the appropriate options:
   - Give me the option of saving to a file whenever I download **Web Connect** data
     - Select this checkbox to have Quicken save updated **Web Connect** data as a file on your hard drive.
     - Clear this checkbox to have your **Web Connect** data entered directly into your **Quicken** data file.
     - **Note**: Some browsers do not allow a program, such as Quicken, to directly open an encrypted downloaded file. If you find this to be the case with your browser, save the **Web Connect** file to your hard drive and then import it by choosing **File** menu > **File Import** > **Web Connect File.**
   - Keep Quicken open after the Web Connect completes
     - Select this check box to have Quicken stay open after receiving **Web Connect** data, if Quicken is launched by the browser.
     - Clear this checkbox to have Quicken close after receiving **Web Connect** data, if Quicken is launched by the browser.

> ⓘ If you're using Direct Connect or Express Web Connect to update your transactions and balances, these options do not apply to you.

Resetting a Web Connect Account

Resetting an account **deactivates and reactivates** the account. You may need to reenter your login information. To reset an account that uses **Web Connect** to update information:

1. Right-click on the account name in your **Account Bar**.
2. Select **Edit/Delete your Account**.
3. Select the **Online Services** tab.
4. Select **Reset Account** (No account data will be deleted).

   > ⓘ If you do not see a button for **Reset Account,** check to be sure this is a connected account and not an offline/manual account. You may also contact customer support.

5. Follow the on-screen instructions.

> ⓘ If you feel you need additional guidance to resolve an account issue visit the support article Web Connect Troubleshooting or contact customer support.