Schedule when Quicken updates my account information

About Schedule Updates

Use the Schedule Updates feature to update your Quicken data whenever you'd like. For example, if you normally use Quicken just after dinner, set up Schedule Updates to bring your Quicken data file up-to-date at 5:00 P.M. each weekday. You can update transactions downloaded from your financial institutions, your Portfolio on Investing.Quicken.com, your quotes, and your Quicken Cloud data.

Schedule Updates can't be used with Web Connect accounts. Some financial institutions that require additional authentication to verify customer identity will also not work with Schedule Updates. In addition, you must still use One Step Update to send online payments, transfers, and email to your financial institutions.

When you enter your Vault password prior to performing a scheduled update, Quicken uses advanced algorithms to encrypt it and then store it in your computer's memory. The encrypted password is never stored on your hard disk, and it would be very difficult technically for unauthorized persons to retrieve it. For additional information, see Tell me about connected services and security.

1. Choose **Tools** menu > **Schedule Updates**.
2. If necessary, select the items you want to update. Click a link below if you need additional information.
    - **Financial Institutions**
      Download your latest cleared transactions and balances for bank, credit card, and investment accounts that are activated for online services from all your financial institutions.
    - **Sync Quicken Cloud**
      Transfer your latest financial information to and from the Quicken Cloud. To learn more, see Using Quicken on Mobile and Web.
    - **Quotes**
      Download quotes, headlines, and alerts.
    - **Quicken.com**
      Choose Update my portfolio on Quicken.com to send Quicken investment account information to your own password-protected area on Quicken.com, where you can check it anytime, anyplace, from any Web-connected computer. You can send individual transactions or just holdings information.
3. Select the days and times at which you want the updates to occur.
4. Choose when you would like to enter your **Password Vault** password.
    - At Windows startup—Quicken will ask you for your Password Vault password every time Windows is launched.
    - Before each scheduled update—Quicken will ask you for your Password Vault password at the time you have chosen for the update.
5. Click **OK**.

Notes

- Updates will occur within 15 minutes of the selected time (not the exact time specified). This helps balance the load on the servers of your financial institutions.
- Scheduled updates can't take place while Quicken is running. If you're using Quicken when an update is scheduled to occur, Quicken displays a message when you exit the application telling you that you've missed a scheduled update.
- The Schedule Updates feature displays informational icons in your Windows **Task Manager** status area.
    - **What do the icons mean?**
        -  (A scheduled update is currently being processed.)
        -  (New information has been downloaded from your financial institutions.)
        -  (A problem occurred while a scheduled update was being processed.)
- To schedule an update for an account, you must store the password for that account in the Password Vault.
- To end **Schedule Updates**, choose **Tools** menu > **Schedule Updates**. Clear the check box beside each account and select **OK**.
- Scheduled updates can only be scheduled for one data file, If **Schedule Update** has been selected in a different data file, turning **Schedule Update** on in the most recent file will override the settings and turn off **Schedule Updates** for the previous file.