

DEACTIVATE/REACTIVATE ONE STEP UPDATE (EWC) Quicken Windows 2008-2011

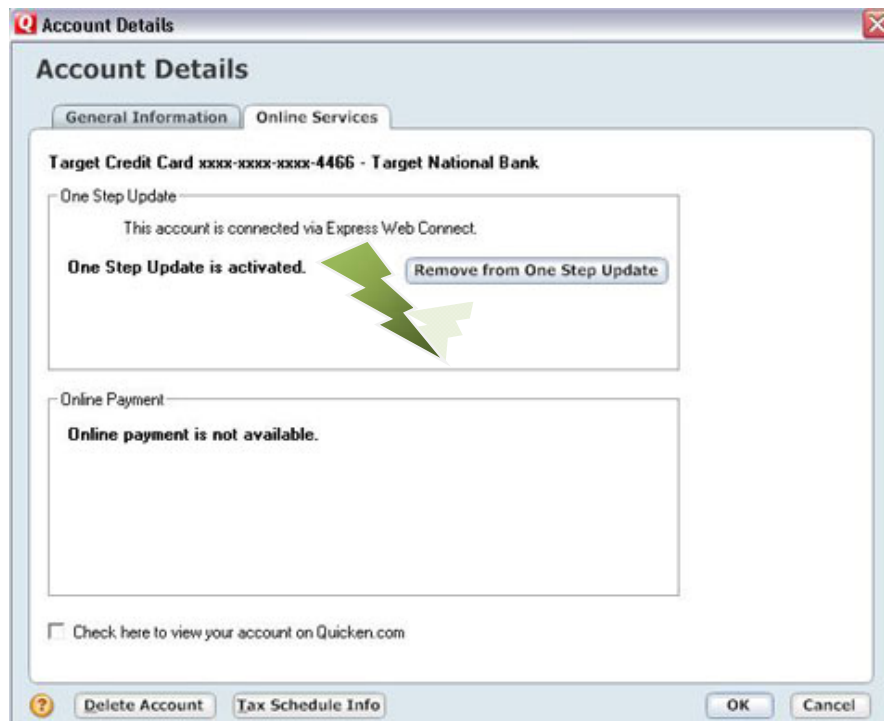
1. Right click the account in the Quicken Account List
2. Select Edit Account from pop-up.



3. Click the Online Services tab. In the One Step Update section, it will state the connection method the end user is using. To disable the account, click on the "Remove from One Step Update" button.



NOTE: If account is connected with Web Connect it will show an option to Remove Connection. Click on this to deactivate the account.



ACTIVATE WEB CONNECT ONLY

1. Login onto your FI website from a web browser to initiate a download of Web Connect file into Quicken. When presented with the below screen, choose the "Use an existing Quicken account" radio button



You are downloading transactions for the following account:

- Financial Institution : Target National Bank
- Account type : Credit Card
- Account number :

If you have set up an account in Quicken to track this account, choose "Use an existing Quicken account" and then select it from the list. Otherwise, choose "Create a new Quicken account" and Quicken will add one for you.

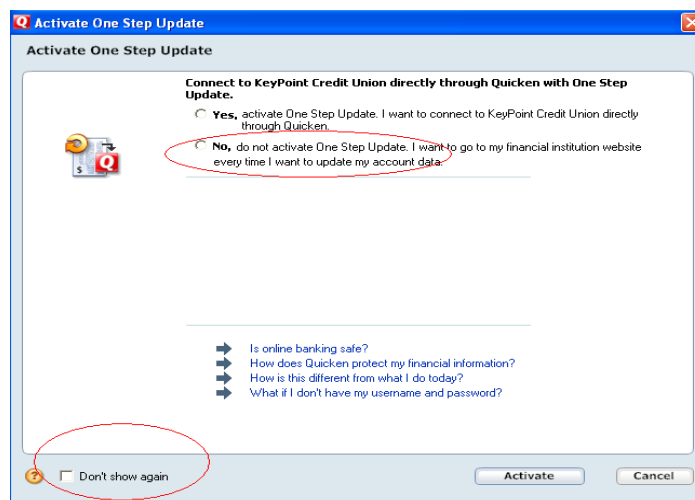
Use an existing Quicken account: Target Credit Card xxxx-xxxx-xxxx-4466
Please choose from the list.

Create a new Quicken account: Credit Card at Target National Bank
Please type an account name.

Continue Cancel Help



NOTE: Now the account will be connected via Web Connect. Quicken may prompt to activate One Step Update after a successful Web Connect download. Please select No do not activate and check the box to not be prompted again. Screen shot on the next page.



Activate One Step Update

Connect to KeyPoint Credit Union directly through Quicken with One Step Update.

Yes, activate One Step Update. I want to connect to KeyPoint Credit Union directly through Quicken.

No, do not activate One Step Update. I want to go to my financial institution website every time I want to update my account data.

Is online banking safe?
How does Quicken protect my financial information?
How is this different from what I do today?
What if I don't have my username and password?

Don't show again

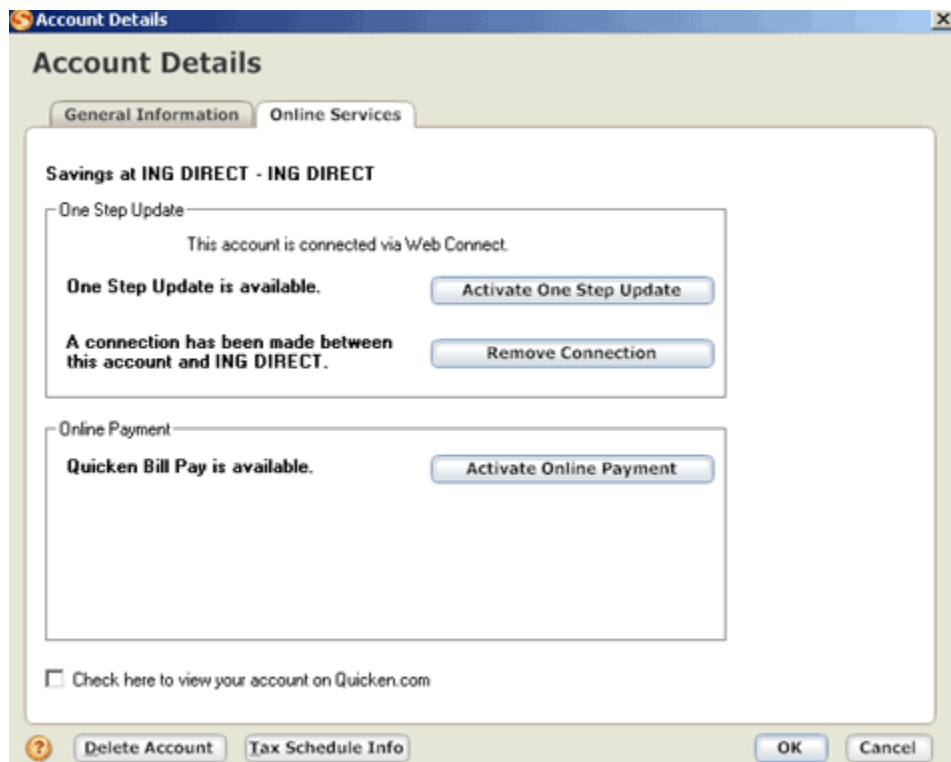
Activate Cancel

REACTIVATE ONE STEP UPDATE (EWC)

1. Right click the account in the Quicken Account List
2. Select Edit Account from pop-up.



3. Click the "Activate One Step Update" button and follow the onscreen prompts to complete the One Step Update activation process. Now the account will be connected using Express Web Connect.





You will be prompted to provide your login credentials and a list of available accounts will be presented. Check any that you want to set up for Express Web Connect. Intuit will log in to the online banking system daily on your behalf and collect the transactions available. When you want to process them, simply click One Step Update and they will automatically download into your accounts for processing.

If you wish to cancel this process, you will need to Deactivate Express Web Connect, which will delete the login token from Intuit's servers.