## Deactivate Online Banking Connection in Quicken for Windows

This document provides action needed and step by step instructions on how to deactivate your accounts on the current online banking connection within Quicken for Windows.

1. Create a Quicken data file backup: go to File menu >Backup and Restore >Back up Quicken File

File	Edit	View	Tools	Mobile & Web	Reports	Help				
	New C	uicken	File					1		
	Open	Quicken	File				Ctrl+O			
	Save a	copy as						& INCOME	PLANNING	INVESTING
	Show	this file o	on my co	omputer						
	Find Quicken Files Set Password for this data file Set Password to modify transactions									
	Backup and Restore						>	Back up	Quicken File	Ctrl+B
	File Im	port					>	Restore f	rom Backup File	w

2. Go to **Tools** menu >Account List:



3. To help identify the accounts you need to take actions on, you need to make sure you have the Financial Institution column, to do so, select **Options** on the lower left of the screen, then select **Show financial institution**.

Account Name		Transaction Download 🚱	Current Balance
Spending			
Checking 🗐	Edit	Yes (Direct Connect)	24.
Savings			
Savings 🖳	Edit	Yes (Direct Connect)	11,050.

You will now be able to see your Financial Institution name next to each of your accounts.

				-		
	Transaction Download 🕜	Financial Institution		Curren	nt Balance	
Edit	Yes (Direct Connect)	Anytown Bank_	5		24.	
Savings						
Edit	Yes (Direct Connect)	Anvtown Bank			11.050.	
	Edit	Edit Yes (Direct Connect)	Transaction Download ? Financial Institution   Edit Yes (Direct Connect) Anytown Bank_	Image: Transaction Download Financial Institution   Edit Yes (Direct Connect) Anytown Bank_	Transaction Download  Financial Institution Currer   Edit Yes (Direct Connect) Anytown Bank_ Image: Connect Connec	

## To deactivate, click Edit

ount List					-	
ount List						
Account Name		Transaction Download 🕜	Financial Institution		Curren	it Balance
Spending	Spending					
Checking 🖳	Edit	Yes (Direct Connect)	Anytown Bank_	ß		24.3
Savings						

## In the Online Services tab, within the Online setup box, select Deactivate

Account D	etails			
ccour	nt Details			
General	Online Services	Display Options		
Online	setup			
C	Checking is set up for transacti	on download.	Automatic entry is: On	Deactivate
Fin	ancial Institution: An	ytown Bank_		Reset Account
		CCC CONNECC		
cu		et connet	No	o account data will be deleted.
- Online	Checking is set up for Online t	Sill Pay	Nc	o account data will be deleted.
- Online	Checking is set up for Online B	Bill Pay	Nc 	Deactivate       Reconcile using online balan

At the next prompt, Would you like to deactivate this service? select Yes.



## Click Ok to move forward

Q Quick	en	×
1	You are about to delete setup information for an online account. To cancel the service, you must call your financial institution.	
	Cancel	

4. Repeat steps for any additional accounts that apply.