



Updating your Credentials in Quicken

Whenever you change your online banking username – whether part of Columbia’s recent security upgrade – or at another time of your choosing, you will also need to update these credentials within Quicken. Follow the steps below within your Quicken software to restore connections after modifying your online banking username. If you have any questions or issues with the steps below, please contact the credit union at 360-891-4000 to be connected with an Electronic Banking Specialist.

Note: *If you use the Password Vault, you'll need to delete the account that recently changed from the Vault, and re-add it after you're done with the steps below. Also, the name of buttons referenced below may vary slightly depending on the version you are using.*

Steps for Mac Users

1. Click on **Accounts** on the top menu bar, then choose **Update All Online Accounts**.
2. From the *Account Status* window, click on **Update Passwords** in the bottom right corner.
3. Choose the Columbia Credit Union account that you wish to update.
4. Enter your new username and password and select okay.

Steps for PC Users

Task 1: **Back-Up Preparation**

Backup your Quicken data file. For instructions to back up your data file, choose **Help** menu > **Quicken Help**. Search for *Backup Data File* and follow the instructions.

Task 2: **Deactivate Account(s)**

1. Choose **Tools** menu > **Account List**. (Keyboard shortcut CTRL+A)
2. Click the **Edit** or **Edit Details** button for the first Columbia account listed.
3. In the **Account Details** dialog box, click on the **Online Services** tab.
4. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.
5. Repeat steps 2-4 for all Columbia Credit Union accounts.

Task 3: Reactive Account(s)

6. Choose **Tools** menu > **Account List**. (*Keyboard shortcut CTRL+A*)
7. Click the **Edit** or **Edit Details** button for the first Columbia account listed.
8. In the **Account Details** dialog box, click on the **Online Services** tab.
9. Click the **Set Up Now (or Activate One Step Update)** button.
10. Type your **new Username** and **Password**. Click **Connect**.

Task 4: Link Your Account(s)

IMPORTANT: Next you will link the account data to the appropriate account register(s) already listed in Quicken. It is critical that you select **Link** or **Exists in Quicken**. **Do NOT select New or Add In Quicken** as this will create a duplicate account register. Follow these steps for each account displayed.

11. Select “Link” from the drop down – even if it is already the default selection. When you roll over the “Link” option, a list of Quicken accounts will display.
12. Look at the account type and nicknames of the accounts pulled from Personal Online Banking to identify and select the matching Quicken accounts from the menu.
13. **Repeat this step for all accounts listed on the screen.**
14. Only after all accounts within that Member Number have been reviewed and matched, click **Next**.
15. You will receive a confirmation. Click **Done** or **Finish**.
16. Repeat steps 6-15 for each additional Member Number you have at Columbia Credit Union.