Deactivating & Re-adding Account(s) – [PC]

(Optional) Back up your current Quicken data file. To do this, click File > Backup and Restore > Back up Quicken File... and then click Back up Now.

1. Click on the gear icon on the top of the Accounts list. You may also click Tools > Account List or use the key command (CTRL + A).
2. On the Account List, click on the Edit button for one of your Members 1st accounts.
3. Under the Online Services tab, click Deactivate and then click Yes to confirm the deactivation.
4. Once deactivated, click back on the General tab and delete the information in the fields labelled Financial Institution and Account Number. Before clicking anywhere else, click OK to save changes. If you have deactivated successfully, you should see Not Available listed in the Transaction Download column of the Account List.
5. Repeat steps 2 through 4 for each of your Members 1st accounts.
6. Once all Members 1st accounts have been deactivated and display a Not Available status, click Done and exit Quicken.
7. Re-open Quicken and click Add an Account. You may choose Checking when prompted to choose an account type.
8. Enter the name Members 1st FCU - New as the name of your bank and click Next.
9. Enter your Members 1st username and password and click Connect. (This process may take several moments to complete)
10. Once this process is complete, you will see a list of all your Members 1st accounts and products. Take a few moments to ensure that each account listed on the left matches the Nickname/Account on the right. If there are any new products that you have never seen in Quicken before and you would like to keep them there, click Add - Add to Quicken, otherwise you can click Ignore - Don't download into Quicken. Once finished, click Next and wait for the accounts to load into Quicken.
11. Once you have reached the Accounts Added screen, click Finish.

If these steps do not resolve your issue, you may need to rename your sub-accounts at Members 1st so that Quicken can differentiate between your sub-accounts and then re-perform the steps listed above. This can be done on Members 1st online by following the steps below:

1. Once logged in, go into one of your accounts. On the left you should see all of your sub-accounts (i.e. Regular Savings, Checking, etc.).
2. Click on one of the sub-accounts and click the pencil icon, which is located to the right of the sub-account name. This will allow you to change the sub-account name. Enter any account name you wish and then click the check mark to save your changes.
3. Repeat steps 1 and 2 for each your sub-accounts. Do this for all of your Members 1st accounts.