

Updating your spending accounts

You can update your latest cleared transactions and online account balances in Quicken from a variety of financial institutions, including banks and credit card companies.

How do I update my spending accounts?

- [Update your spending accounts](#)
- [Review and accept downloaded transactions](#)
- [Review and accept updated online payments and transfers](#)
- [Change Web Connect download options](#)

How does this work for credit card transactions?

Updating credit card transactions

Updating a credit card account with online account access is just like updating a checking or savings account. You simply download the transactions and they will be categorized and entered into your register for you. If you have already entered some of these transactions into your register, they will be matched with the transactions that are downloaded (see "How are credit card transactions accepted in my account register" below). Note: If you want to take an additional step to verify that all of your transactions are correct and accounted for, uncheck Automatically add to banking registers in your [Downloaded transactions](#) preferences. This will let you inspect each transaction and compare it with any that you may have manually entered before adding it to your register.

For more information about tracking credit cards, see [Decide how to track credit cards in Quicken](#)).

How are credit card transactions accepted into my account register?

Quicken uses the following guidelines during the matching process:

- Starting with the earliest downloaded transaction, Quicken looks for the earliest register transaction that has a date within the last 30 days. (Transactions that have been previously matched are not considered for matches again.)
- Then Quicken looks for a register transaction that has the exact same amount as the downloaded transaction.

What if I need to dispute an incorrect credit card charge

If you believe that there is a mistake in a downloaded credit card transaction, contact your financial institution directly. Instructions for contacting your financial institution are usually printed on the back of your paper statement.

Please don't call Quicken Support about a disputed transaction. Only your financial institution can help you with disputed transactions.

More information

- [Tell me about updating my investing accounts](#)