

# How to Force Branding & Profile Updates

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*Quicken for Windows*

## Table of Contents

INTRODUCTION .....	2
NAMING CONVENTIONS AND ACRONYMS .....	2
FORCED UPDATE TO THE BRANDING/PROFILE .....	3

## Introduction

Desktop products that support Open Financial Exchange (OFX) send an OFX Branding request to Intuit's Branding server and an OFX Profile request to the FI OFX server every 24 to 48 hours. This download window serves to reduce network traffic, because the Branding and Profile data is not frequently updated.

This download interval can create specific issues. For example, when a financial institution (FI) makes significant changes to their OFX solution, those changes frequently include updated Branding and Profile information. Quicken must have those updates to complete the online session, but the updates may not be available if the customer's last download was less than 48 hours ago.

This document includes instructions to force Quicken for Windows to send a Branding and Profile request on the next online session, even if the user has just completed a download.

**IMPORTANT:** These instructions are only used in Quicken for Windows. Other products (Quicken for Mac, QuickBooks for Mac, QuickBooks for Windows) are not able to force Branding and Profile updates.

## Naming Conventions and Acronyms

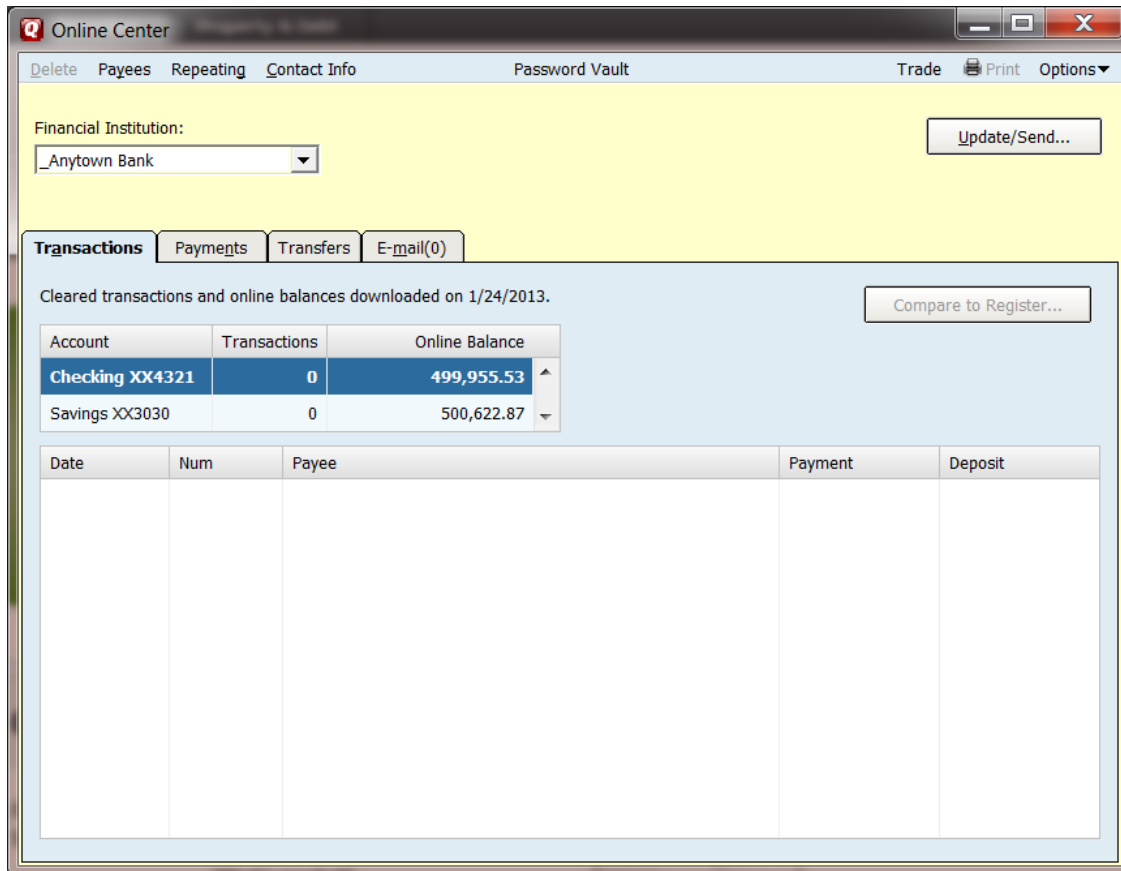
You will see these terms and acronyms used when discussing online banking in Quicken:

- **OFX** – Open Financial Exchange. OFX is the communication protocol used behind the scenes to send and receive financial data between Quicken for Windows and the FI. You can learn more about OFX by reviewing the OFX specification at [www.ofx.net](http://www.ofx.net).
- **User** – The FI customer who is sending or receiving online activity in Quicken or QuickBooks.
- **Branding Session** – During online banking setup or transaction download, Quicken first sends a request to Intuit's Branding server. The Branding Session gathers non-user specific information about OFX services the FI supports (such as bank statement download, payments, transfers, etc.). Quicken also uses this session to find the FI OFX server URL, and general marketing information about the FI.
- **Profile Session** – Quicken's second request during online banking setup or transaction download. The Profile Session communicates specific settings the FI's OFX server has in use. Some settings that are tracked here include password limitations and parameters, specifics about the different OFX services offered (lead time for online bill payment delivery, for example), and contact information for the FI that can be displayed in Quicken.
- **FI OFX Server** – The OFX solution a financial institution is using to send and receive OFX Direct Connect information over the internet.

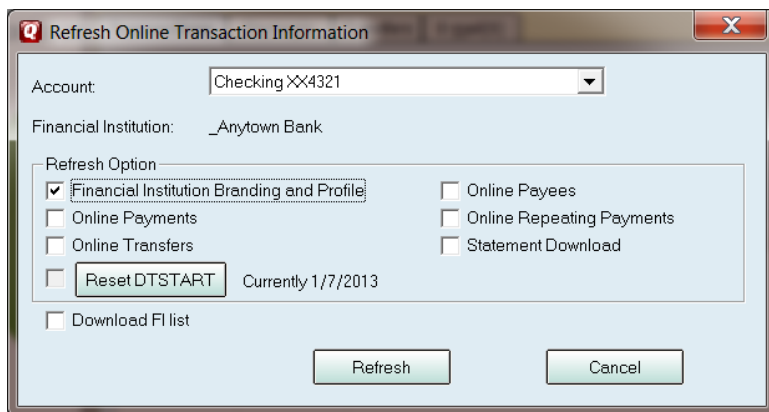
## Force a Branding/Profile Update

Use this section to force Quicken for Windows to update its Branding and Profile information.

1. In Quicken, select **Tools > Online Center**.



2. While holding the **Ctrl** and **Shift** keys, click **Contact Info**. You will see the **Refresh Online Transaction Information** dialog.



3. Choose the account you need to update from the **Account:** pull down menu.

4. Click the box for **Financial Institution Branding and Profile** in the **Refresh Option** section.

**IMPORTANT:** Do not check boxes other than **Financial Institution Branding and Profile** without guidance from Intuit. Using these other troubleshooting features can cause issues like duplicate payments, payees, transactions, etc. which can cause undesired results and extra work.

5. Click **Refresh** and the dialog closes.
6. Back in the **Online Center**, click **Update/Send...**
7. Quicken sends a Branding and Profile request during the online session and forces an update.