YOUR QUICK START GUIDE TO

QUICKEN FOR WINDOWS 2013-2015 WEB CONNECT CONVERSION INSTRUCTIONS

Modifying your Quicken settings

You will need to modify your Quicken settings to ensure the smooth transition of your data to our enhanced online banking system.

IMPORTANT: Please be sure to perform the following instructions exactly as described and in the order presented. Otherwise, your service may stop functioning properly. This conversion should take between 15 and 30 minutes.

Preparing for the Conversion

1. Back up your data file. For instructions to back up your data file, choose **Help → Search**. Search for **Backing Up Your Data** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help → Search**. Search for **Update Software** and follow the instructions.

Deactivate Your Account(s) At Capital One

1. Choose **Tools → Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the *Account Details* dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps 2-6 for each account at Capital One.

Re-activate Your Account(s) at Capital One

1. Log in to https://Intellix.capitalonebank.com and follow these instructions to download your Quicken Web Connect file.
   - **A.** Select **Services → Information Reporting → Export Information**
   - **B.** Click **Create Export**
   - **C.** Select **Quicken (OFX Format)** from the Export Type field
   - **D.** Enter the **File Name** you wish for the file to be created with
   - **E.** Enter the **Date Range** for the data you wish to extract
   - **F.** Select the **Accounts** you wish to export
   - **G.** Click **Create Export**
   - **H.** Close the Confirmation window indicating the request was submitted
   - **I.** Once the status of the request changes to “Complete”, download and save the file by selecting **Download** from the Actions drop-down menu

2. Click **File** → **File Import** → **Web Connect File**.
3. If prompted for connectivity type, select **Web Connect**.

   IMPORTANT: Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.
4. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching account in the drop-down menu.

   IMPORTANT: Do **NOT** select **Create a new account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.
5. Repeat steps 2-4 for all of your accounts at Capital One.