QUICKEN FOR MAC 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**, select **Backing up data files**, and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** → **Search**. Search for **Updates**, select **Check for Updates** and follow the instructions.

Deactivate Your Account(s) at Capital One

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** → **Settings**.
3. Remove the checkmark from **I want to download transactions**.
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. Repeat steps 2-5 for each account at Capital One.

Re-activate Your Account(s) at Capital One

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** → **Update Selected Online Account**.
3. Enter Capital One in the Search field and click **Continue**.
4. 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

5 Download a file of your transactions to your computer.

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.

6 Drag and drop the downloaded file into the box **Drop download file**.

NOTE: Select **Web Connect** for the Connection Type if prompted.

7 In the *Accounts Found* screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the *Action* column, select **Link** to pick your existing account.

IMPORTANT: Do **NOT** select **ADD** under the action column.

8 Click **Continue**.