

Quicken for Windows 2011 - 2013 Conversion Instructions

When Capital Bank upgrades the online banking system on April 15th you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your new customer ID and PIN that was used on the new Capital Bank website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.



This update is time sensitive and can be completed on or after April 15, 2015.



This detour symbol indicates section instructions that are using bill pay within Quicken only. If you do not use Quicken to make online bill payments, you can skip these sections or steps.

Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu → **Quicken Help**. Search for “Backup Data File” and follow the instructions.
2. Download the latest Quicken update. For instructions to download to download an update, choose **Help** menu → **Quicken Help**. Search for “Update Software” and follow the instructions.

Connect to Capital Bank

1. Choose **Tools** menu → **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.
3. In the One Step Update Settings dialog, make sure all items are checked and click **Update Now**.
4. If new transactions display in the Online Update Summary, accept them in your Quicken account register.

Deactivate Your Account(s)

1. Choose **Tools** menu → **Account List**.
2. Click the **Edit** or **Edit Details** button of the account you want to deactivate.
3. In the Account Details dialog, click on the **Online Services** tab.
4. Click on **Deactivate** or **Deactivate Online Payment** (only available if you use bill pay services). Follow the prompts to confirm the deactivation.
5. Click **Deactivate** or **Remove from One Step Update**. Follow the prompts to confirm the deactivation.



Note: The name of the buttons referenced above may vary depending on the services you currently use and the version of Quicken you are using.

6. Click on the **General** or **General Information** tab. Delete the Account Number.
7. Delete the name of the Financial Institution. Click **OK** to close the window.
8. Repeat steps 2 – 7 for each account at Capital Bank.

Re-activate Your Account(s) at Capital Bank

1. Log in to Capital Bank web site at www.capitalbankep.com.
2. Download your transactions to Quicken.
3. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** or **Use an existing Quicken account** and select the matching account in the drop-down menu.



DO NOT select **Create a new account** or **Create a new Quicken 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.

4. Repeat steps 2 – 3 for all of your accounts.

Thank you for making these important changes!