

# QuickBooks Online Edition Conversion Instructions

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*QuickBooks Online Edition (QBO V78)*

## Introduction

As **Midwest Bank** completes its system conversion, you will need to modify your QuickBooks Online Edition settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive.

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.

## Documentation and Procedures

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### Conversion – Information only

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QuickBooks Online data is stored on Intuit servers in the cloud. Since we update your records with every change, we cannot restore your file to a previous point in time.

QuickBooks Online automatically updates your selected version so you are always on the latest release.

**IMPORTANT:** QuickBooks Online edition connectivity services may be interrupted up to 3-5 business days after the conversion is complete.

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**Task 1:** Connect to **Midwest Bank** for a final download by **September 12, 2016**

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**NOTE:** Please skip to page 4 if you **Manually Import Transactions**.

1. Choose **Transactions > Banking**.
2. In the upper right corner, click **Add Account**.
3. Enter **Midwest Bank** and click **Find**.
4. Click the link for **Midwest Bank**.
5. Type your **User Id** and **Password** and click **Log In**.
6. If the bank requires extra information, enter it to continue.

7. Choose an **account type** for each account you're connecting.
8. Click **Connect** to download up to 90 days of transactions.

**NOTE:** If you need a shorter date range, click **Need a shorter date range?** at the top and choose between **0**, **7**, or **30** days.

9. After your download finishes, click the **New Transactions** tab to see what was downloaded.

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**Task 2:** Undo Excluded Transactions

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1. Choose **Transactions > Banking**.
2. Click the **Excluded** tab.
3. Click the checkboxes for the transactions you want to include.
10. Click **Batch Actions > Undo**.
11. Transactions will appear again in the **New Transactions** tab for you to work with.

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**Additional Instructions: Manually Import Transactions**

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1. Log in to **Midwest Bank** website at [www.midwestbank.net](http://www.midwestbank.net).
2. Download one of the following Web Connect files.
  - a. .qbo (QuickBooks)
  - b. .qfx (Quicken)
3. In **QuickBooks Online**, choose **Transactions > Banking**.
4. In the upper right corner, click **File Upload**.
5. Click Browse and select **Midwest Bank** Web Connect file from your computer.
6. Click **Next**.
7. In the drop-down menu, select the account where you'd like to upload the transactions.
8. When the download is finished click **I'm done. Let's go!**
9. After your download finishes, click the **New Transactions** tab to see what was downloaded.

***Thank you for making these important changes!***