

QuickBooks for Windows Conversion Instructions



QuickBooks for Windows 2013–2016

Direct Connect

Introduction

Inwood National Bank is pleased to announce connectivity with Intuit products and **Inwood National Bank's** online banking. You will need to modify your Quicken settings to ensure the smooth transition of your data. Please reference the dates next to each task as this information is time sensitive. To complete these instructions, you will need your username and password for the **Inwood National 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.

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help menu > QuickBooks Help**. Search for **Back Up** and follow the instructions.
2. Download the latest QuickBooks update. For instructions to download an update, choose **Help menu > QuickBooks Help**. Search for **Update QuickBooks**, then select **Update QuickBooks** and follow the instructions.

IMPORTANT: If multiple computers do not use the same QuickBooks data file, skip step 3. QuickBooks activities such as **Online Banking** cannot be performed in multi-user mode because of the way the activities interact with a company data file.

3. Switch to single user mode. For instructions to switch to single user mode, choose **Help menu > QuickBooks Help**. Search for **Switch to Single User Mode** and follow the instructions.

IMPORTANT: If you are not using Register Mode, enable it for the conversion. You can change it back after the conversion is complete.

4. Enable Register Mode. (Classic Mode in QuickBooks 2014 and newer).
5. For instructions to enable register mode, choose **Help menu > QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Task 2: Match Downloaded Transactions

If new transactions were received from your connection, accept all new transactions into the appropriate registers.

If you need assistance matching transactions, choose **Help menu > QuickBooks Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: Deactivate Your Account(s) at *Inwood National Bank*

NOTE: All transactions must be matched or added to the register prior to deactivating your account(s).

1. Choose **Lists menu > Chart of Accounts**.
2. Select the account you want to deactivate.
3. Choose **Edit menu > Edit Account**.
4. Click on the **Online Services** tab in the Edit Account window. The tab is named **Bank Feed Settings** in QuickBooks 2014 and newer.
5. Select **Deactivate All Online Services** and click **Save & Close**.
6. Click **OK** for any dialog boxes that may appear with the deactivation.
7. Repeat steps 2 – 6 for each account at ***Inwood National Bank***.
8. Backup your data file.

Task 4: Re-activate Your Account(s) at *Inwood National Bank*

1. **QuickBooks 2013:** Choose **Banking** menu > **Online Banking Center**.
QuickBooks 2014 or 2015: Choose **Banking** menu > **Bank Feeds > Bank Feeds Center**.
QuickBooks 2016: Choose **Banking** menu > **Bank Feeds > Set Up Bank Feed for an Account**.
2. Choose ***Inwood National Bank*** and click **Next**.
3. If prompted for connectivity type, select **Direct Connect**.
4. Link your bank account with the existing QuickBooks account and click **Connect**.
5. Repeat steps 1 – 5 for all accounts at ***Inwood National Bank***.

Task 5: Re-enable Side by Side Mode (if necessary)

NOTE: If you prefer register mode, you are finished with your conversion. If you use the Side by Side mode (Express Mode in QuickBooks 2014 and newer) for online banking, you may now re-enable the mode.

For instructions to enable Side by Side mode (Express Mode), choose **Help > QuickBooks Help**. Search for **Banking Feed Modes**, then select **Bank Feed Modes overview**, and follow the instructions.

Thank you for making these important changes!