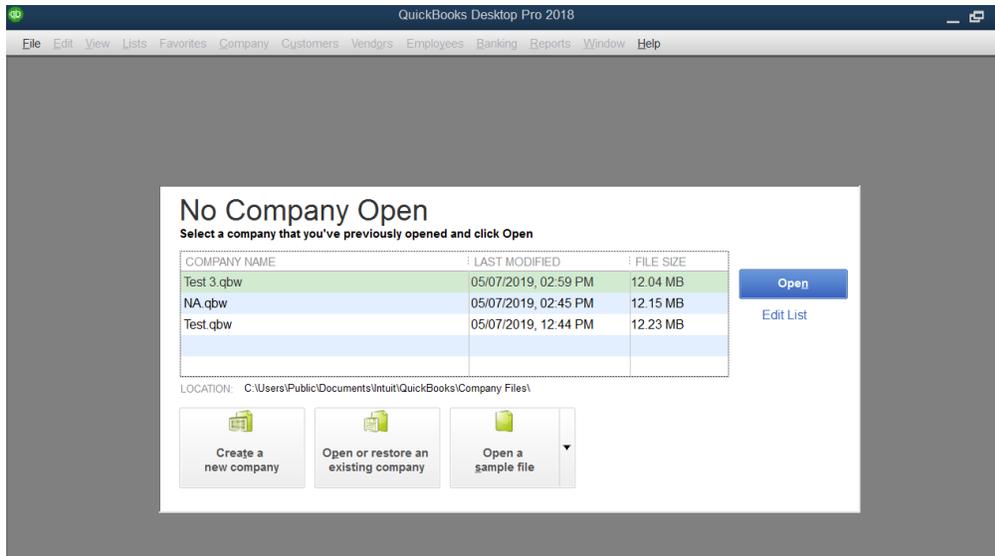


QuickBooks Direct Connect

1. After opening QuickBooks®, select **Create a Company**. If you are already signed into QuickBooks® and have your company set up, start at **Step 6**.



2. Select for whom you are creating the company file and then select **Start Setup**.



What does creating a company file require?

For creating a company file you need to have an Intuit account, which would provide you:



-  Better control of your data
-  Superior fraud protection
-  One account for all Intuit products

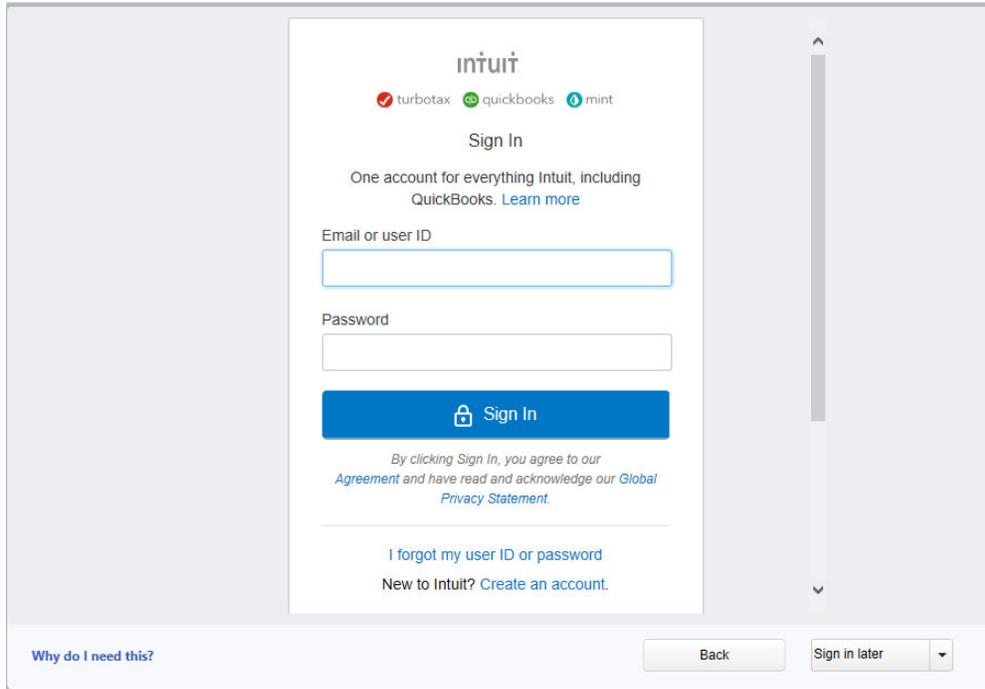
Who are you creating the company file for?

For myself (I'm the admin)
My email will be used to create an Intuit account, which will be used to access all Intuit products.

For someone else
I'm creating the company file on behalf of the admin.

Open or convert existing files from QuickBooks or other software.

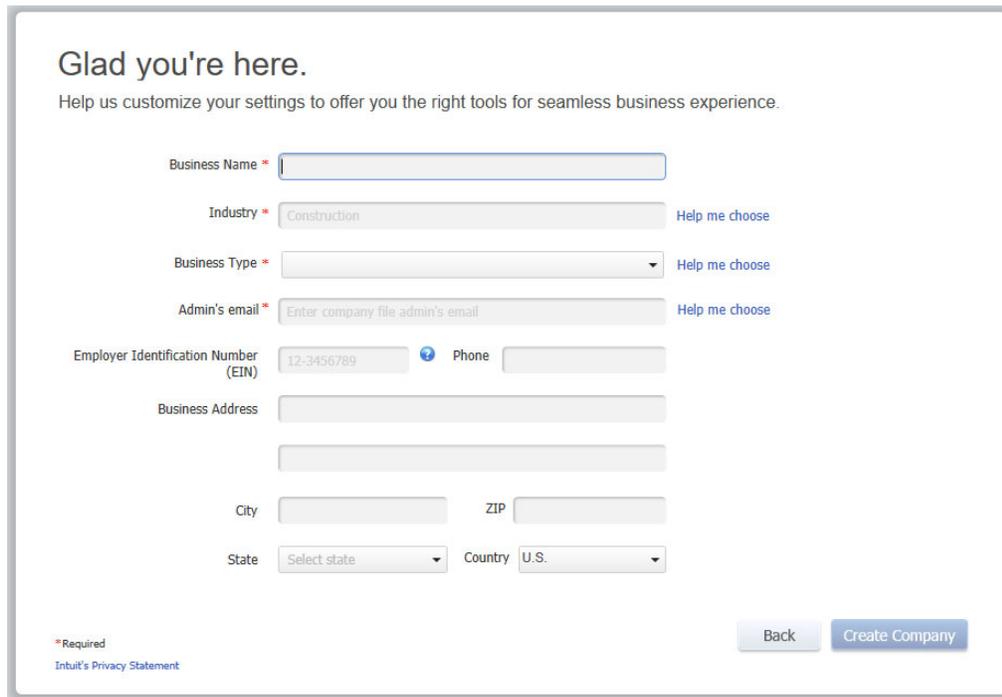
3. Sign in if you have an Intuit account, or you can sign in later.



The image shows the Intuit sign-in page. At the top, the Intuit logo is displayed, followed by icons for TurboTax, QuickBooks, and Mint. Below this is the "Sign In" heading and a sub-heading: "One account for everything Intuit, including QuickBooks. [Learn more](#)". There are two input fields: "Email or user ID" and "Password". A blue "Sign In" button with a lock icon is positioned below the fields. Underneath the button, a small disclaimer reads: "By clicking Sign In, you agree to our [Agreement](#) and have read and acknowledge our [Global Privacy Statement](#)". At the bottom of the form, there are two links: "I forgot my user ID or password" and "New to Intuit? [Create an account](#)".

Why do I need this?

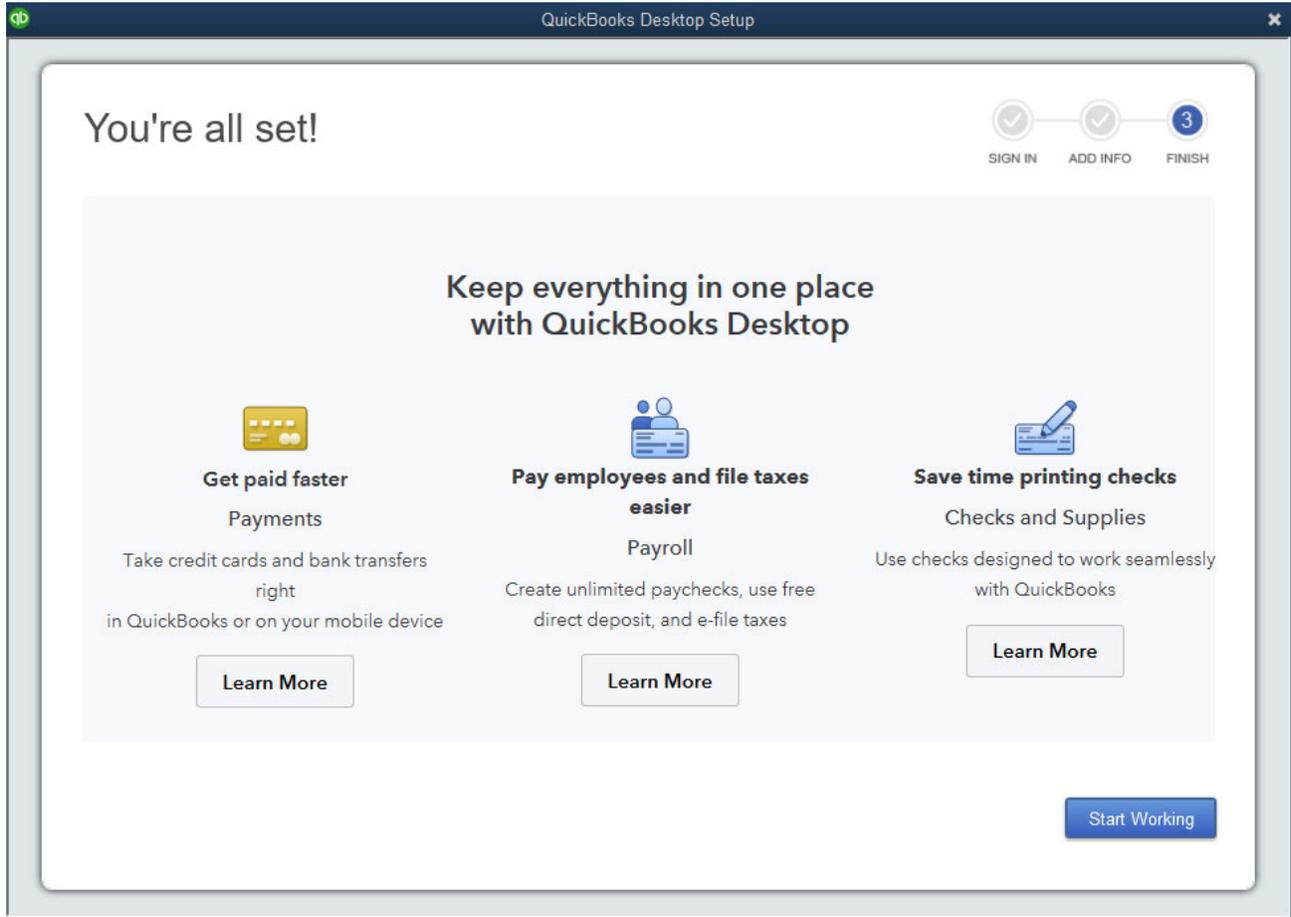
4. Fill out your company information and then select **Create Company**.



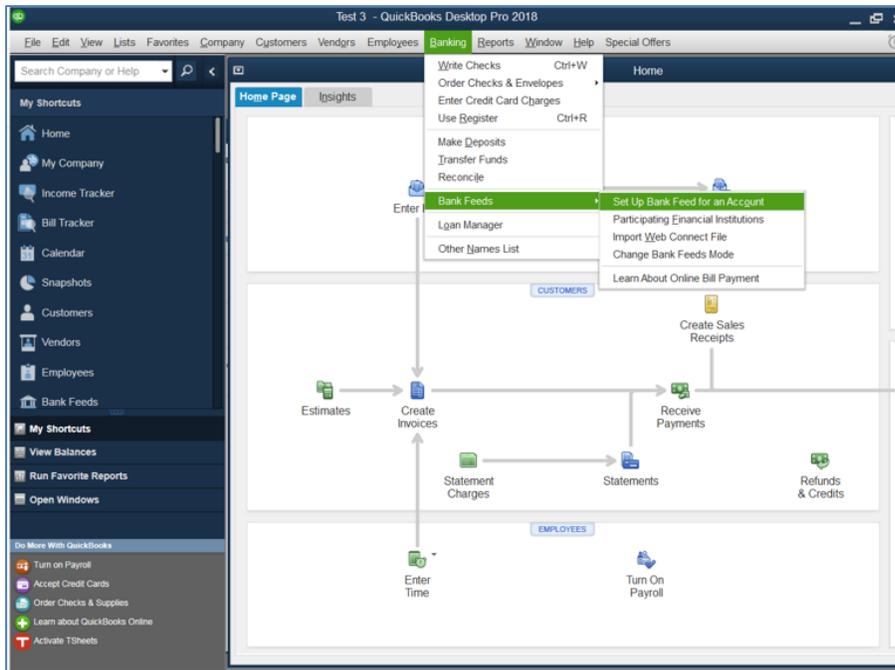
The image shows a "Glad you're here." form for setting up a company. The heading is "Glad you're here." followed by the text "Help us customize your settings to offer you the right tools for seamless business experience." The form contains several fields: "Business Name" (required), "Industry" (with a dropdown menu showing "Construction" and a "Help me choose" link), "Business Type" (required, with a dropdown menu and "Help me choose" link), "Admin's email" (required, with a placeholder "Enter company file admin's email" and "Help me choose" link), "Employer Identification Number (EIN)" (with a dropdown menu showing "12-3456789" and a "Phone" field), "Business Address" (with two stacked text input fields), "City" (with a dropdown menu), "ZIP" (with a text input field), "State" (with a dropdown menu showing "Select state"), and "Country" (with a dropdown menu showing "U.S."). At the bottom left, there is a note: "*Required Intuit's Privacy Statement". At the bottom right, there are two buttons: "Back" and "Create Company".

*Required
Intuit's Privacy Statement

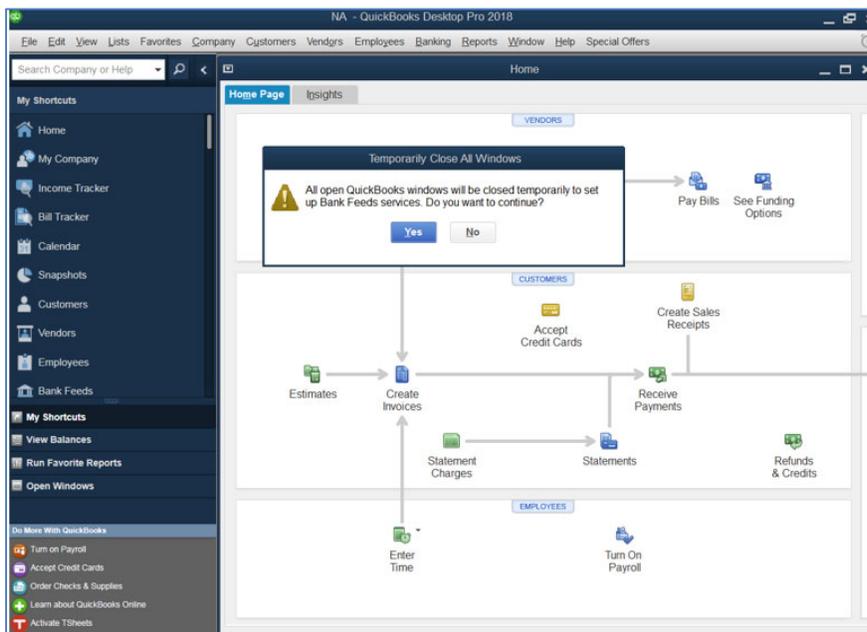
5. Select **Start Working**.



6. You are now ready to set up **Direct Connect through Online Banking**. On the toolbar you will select the **Banking** tab, **Bank Feeds**, and **Set Up Bank Feed for an Account**.

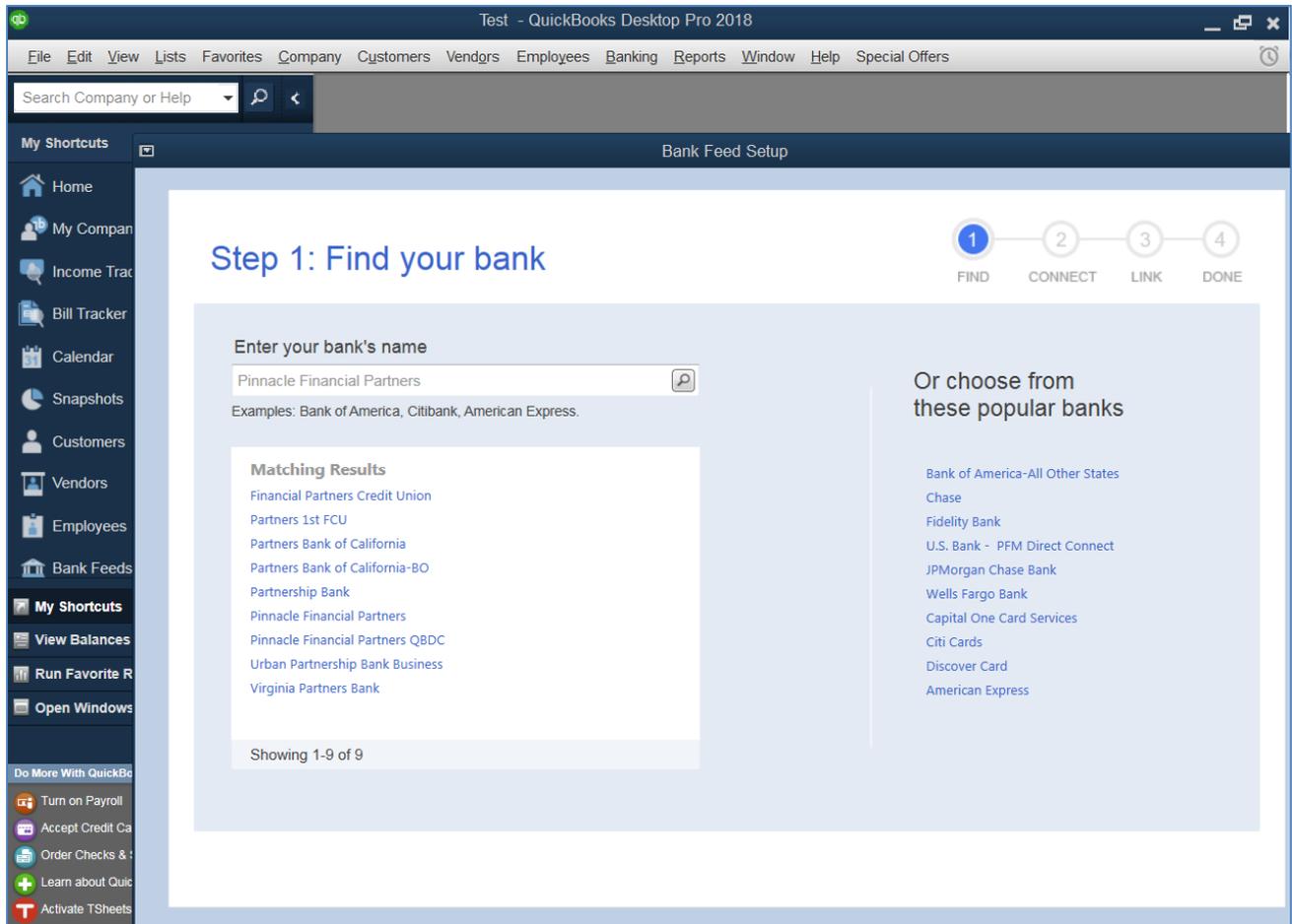


7. Yes, you want to continue.

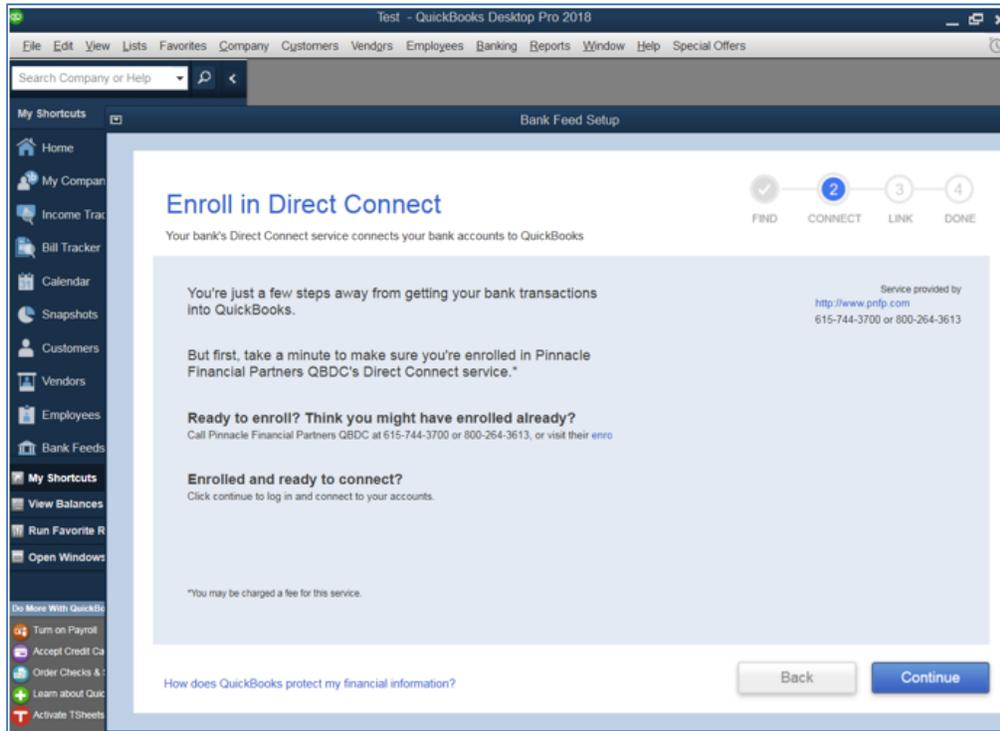


8. In the next screen, type in **Pinnacle Financial Partners** in order to pull up both Pinnacle options. If you want the **Direct Connect** method for download, choose **Pinnacle Financial Partners QBDC**. (**NOTE:** Pinnacle Financial Partners QBDC is not an available option in QuickBooks *Online*. QuickBooks Online users can direct connect by selecting just **Pinnacle Financial Partners**).

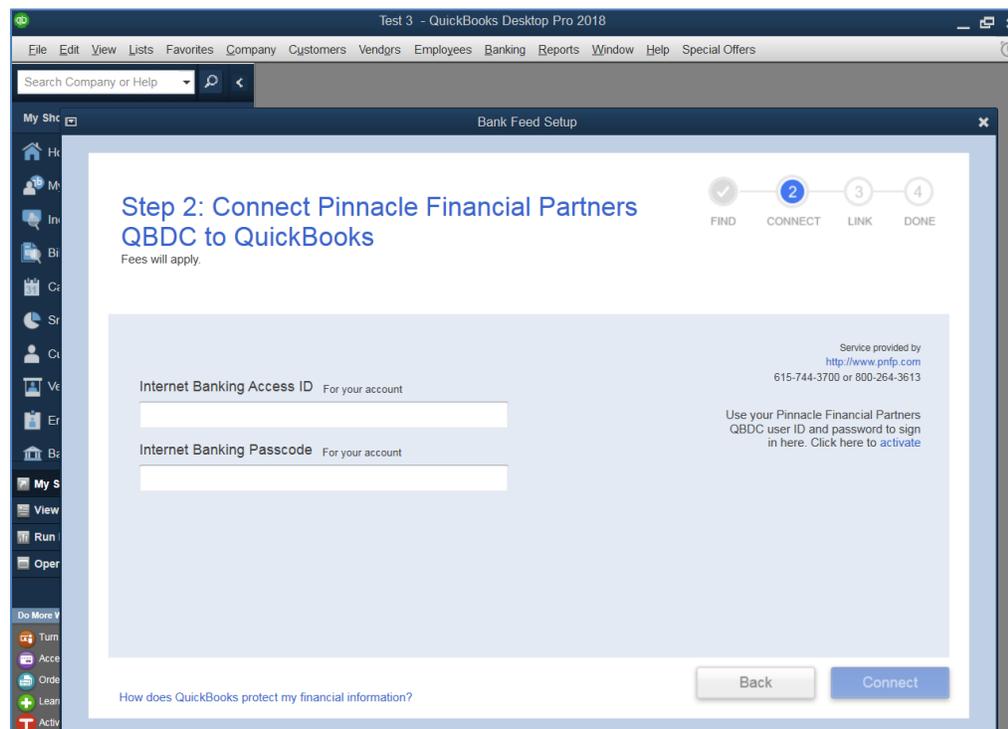
If you do not want to use the Direct Connect method and prefer to download the file manually, do this under the **History** tab in Pinnacle Online Banking.



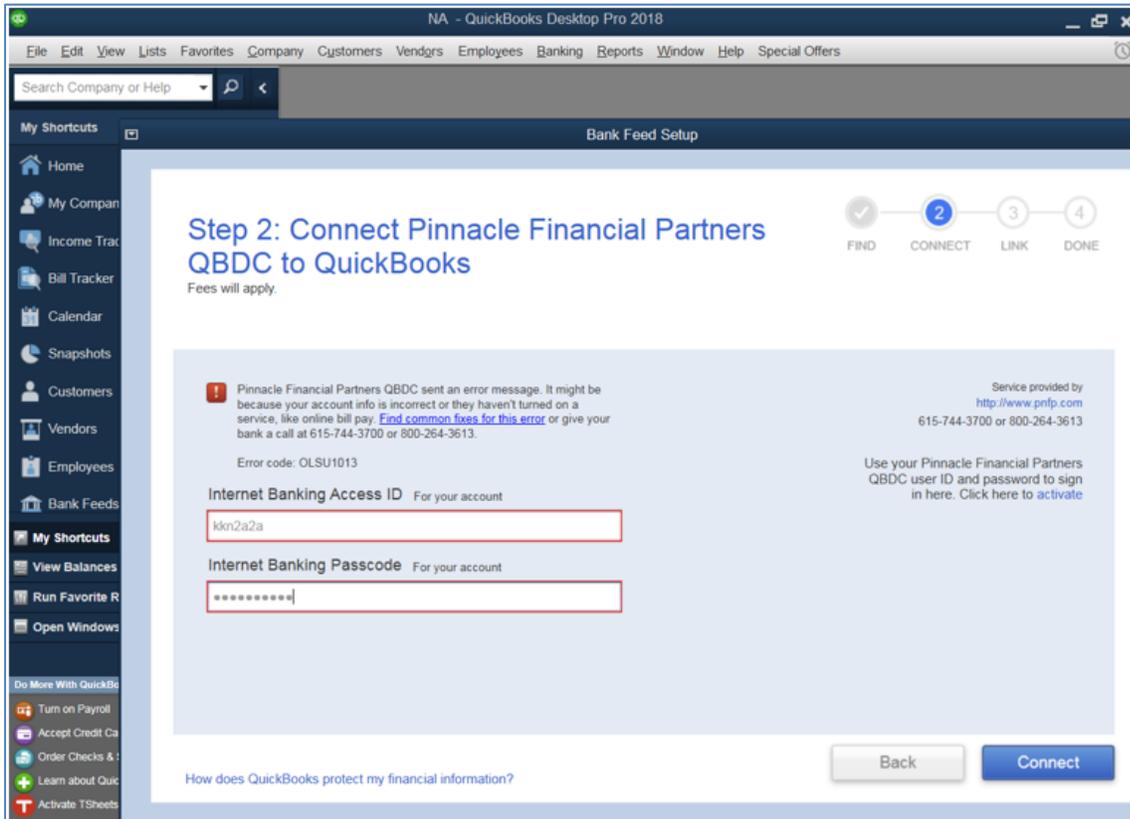
9. Select **Continue** to enroll in Direct Connect.



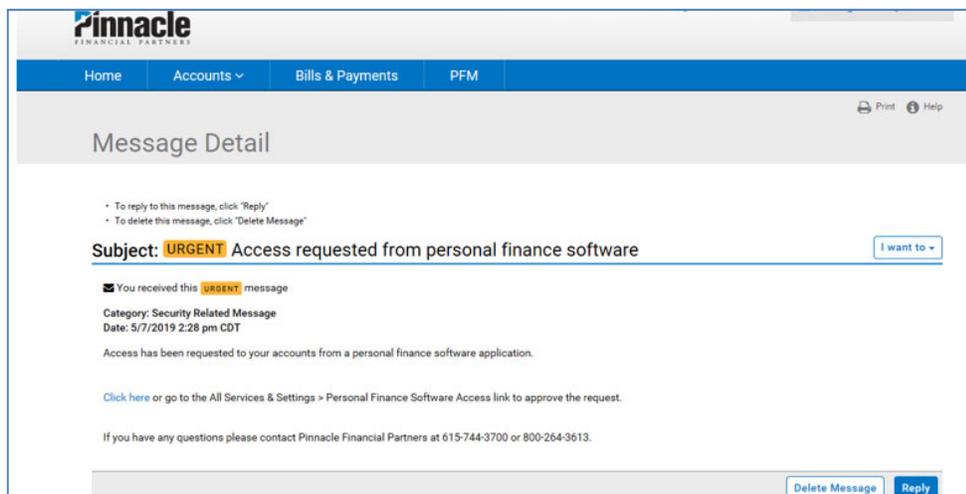
10. Enter your Access ID and password for your Pinnacle Online Banking, and then click **Connect**.



- The first attempt at signing in might fail. If so, please log in to Pinnacle Online Banking to enable and confirm QuickBooks® access. You may log into Online Banking while in QuickBooks by selecting the **Click Here to Activate** option.



- Once you are signed in, you should see a message notification titled **“Access Requested.”** Open the message and follow the directions in the message received.



Pinnacle
FINANCIAL PARTNERS

Home Accounts ▾ Bills & Payments PFM Help

Services & Settings

Change Personal Financial Software Access

As an additional precaution, enable/disable access for your Personal Financial Software by selecting the Enable or Delete links.

Application	Version	First Connection	Last Connection	Status	
Quicken Win	2017	05/06/2019 16:51:56	05/06/2019 16:51:56	Authorized	Delete
Quickbooks	2018	05/07/2019 12:20:48	05/07/2019 12:39:44	Authorized	Delete
Quickbooks	2018	05/07/2019 14:28:30	05/07/2019 14:28:30	Pending	Enable Delete

Pinnacle
FINANCIAL PARTNERS

Home Accounts ▾ Bills & Payments PFM Help

Services & Settings

Updating Personal Financial Software access

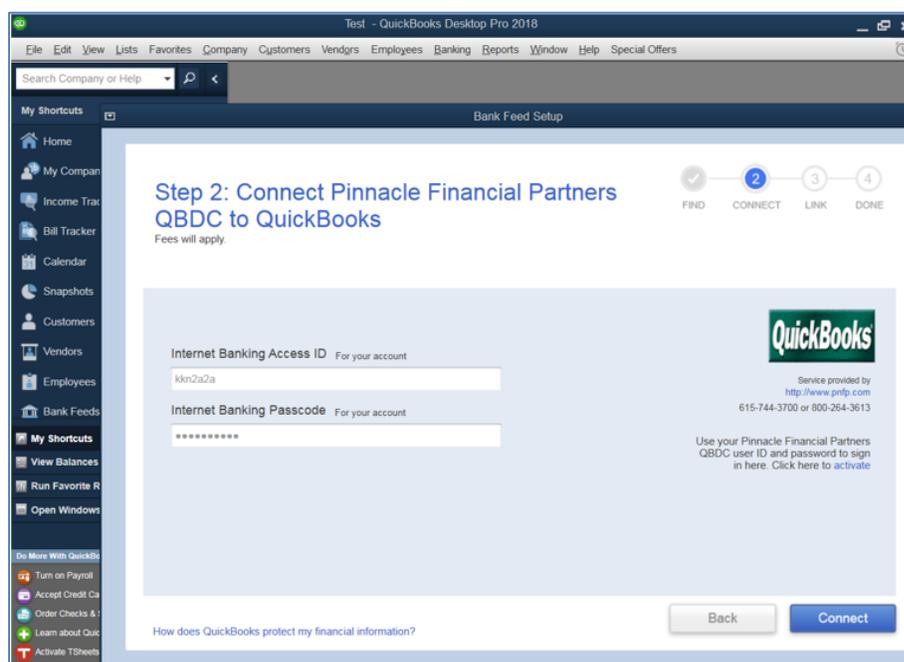
Change Personal Finance Software Access

Confirm the changes are being made to your Personal Finance Software access.

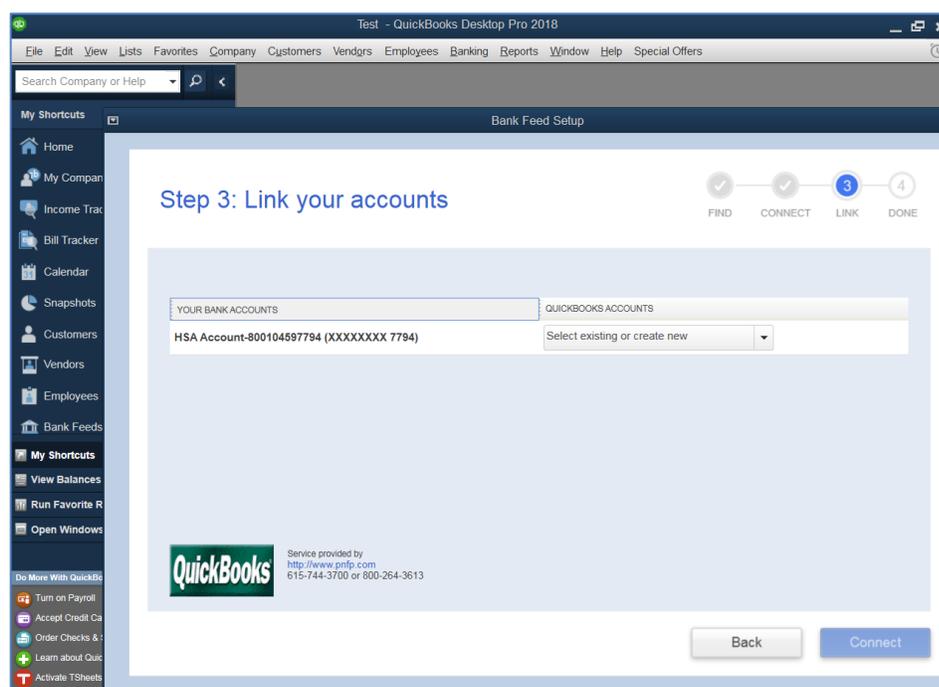
Application	Version	First Connection	Last Connection	Status	Action
Quickbooks	2018	05/07/2019 14:28:30	05/07/2019 14:28:30	Pending	Enable

[Confirm](#) [Cancel](#)

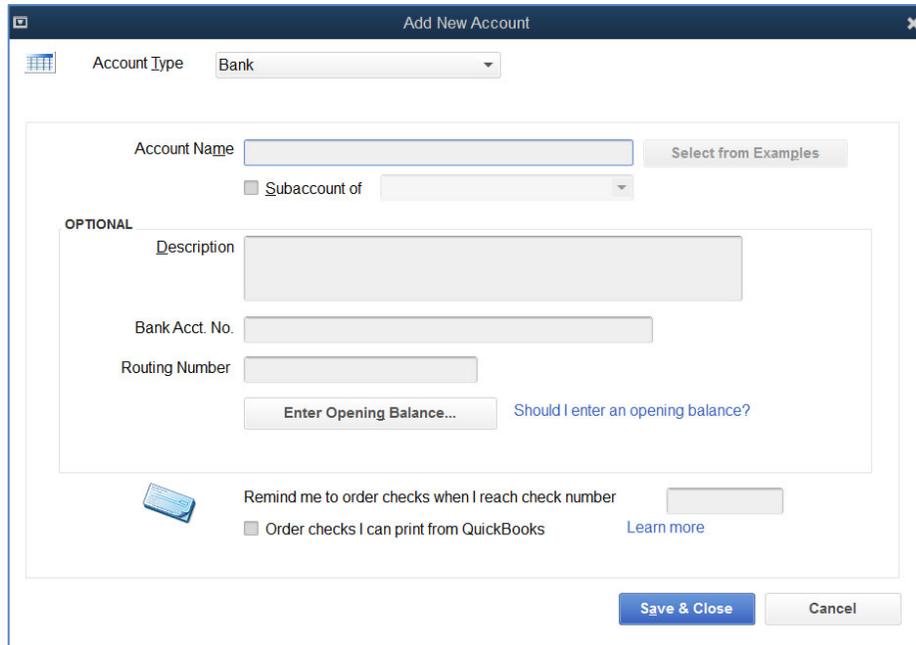
13. Clicking **Confirm** takes you back to **User Services**. Then go back into QuickBooks and log out of Online Banking, if you are finished there. Once you are back in QuickBooks, you will be back at the screen showing the error. Please click the **Back** button, which will take you back to the sign-in screen , re-enter your Pinnacle Online Banking Access ID and password, and select **Connect**.



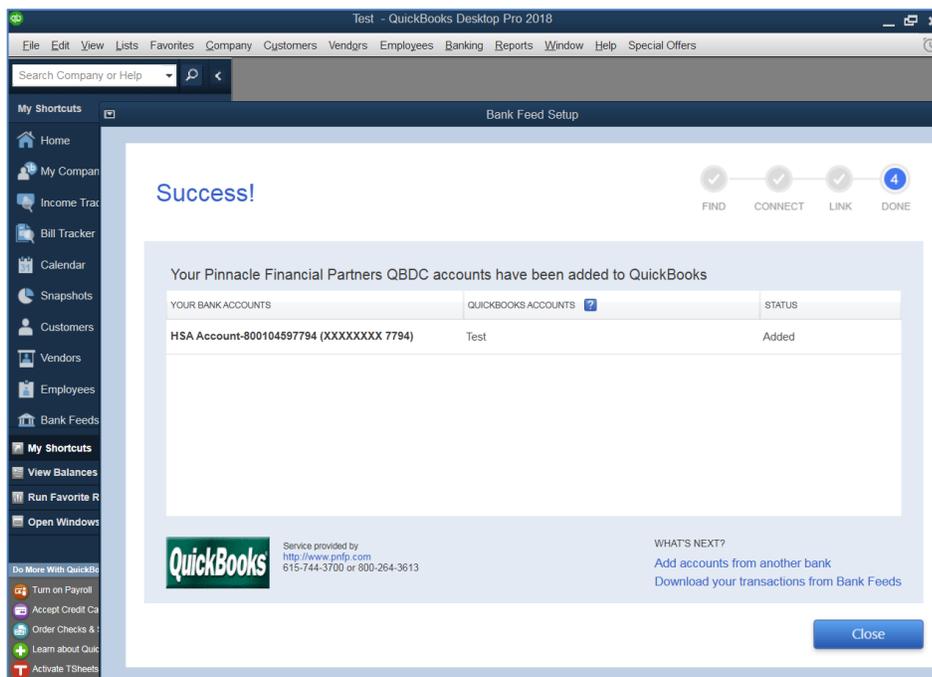
14. This time, a list of accounts will show up. Select the business account you wish to add or create a new one if applicable.



- On the next screen, type in the “name” of your Pinnacle business account under account name. All other fields are optional. Then choose **Save & Close** and then **Connect**.



- Success! This Pinnacle Financial Partners account has been added to QuickBooks.



Success!

YOUR BANK ACCOUNTS | QUICKBOOKS ACCOUNTS | STATUS

YOUR BANK ACCOUNTS	QUICKBOOKS ACCOUNTS	STATUS
HSA Account-800104597794 (XXXXXXXX 7794)	Test	Added

Close