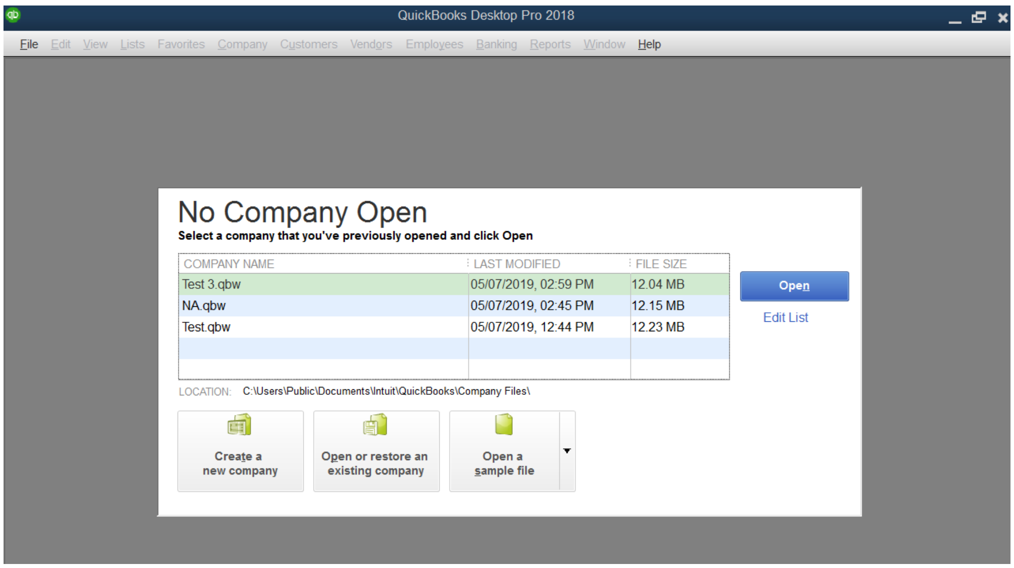
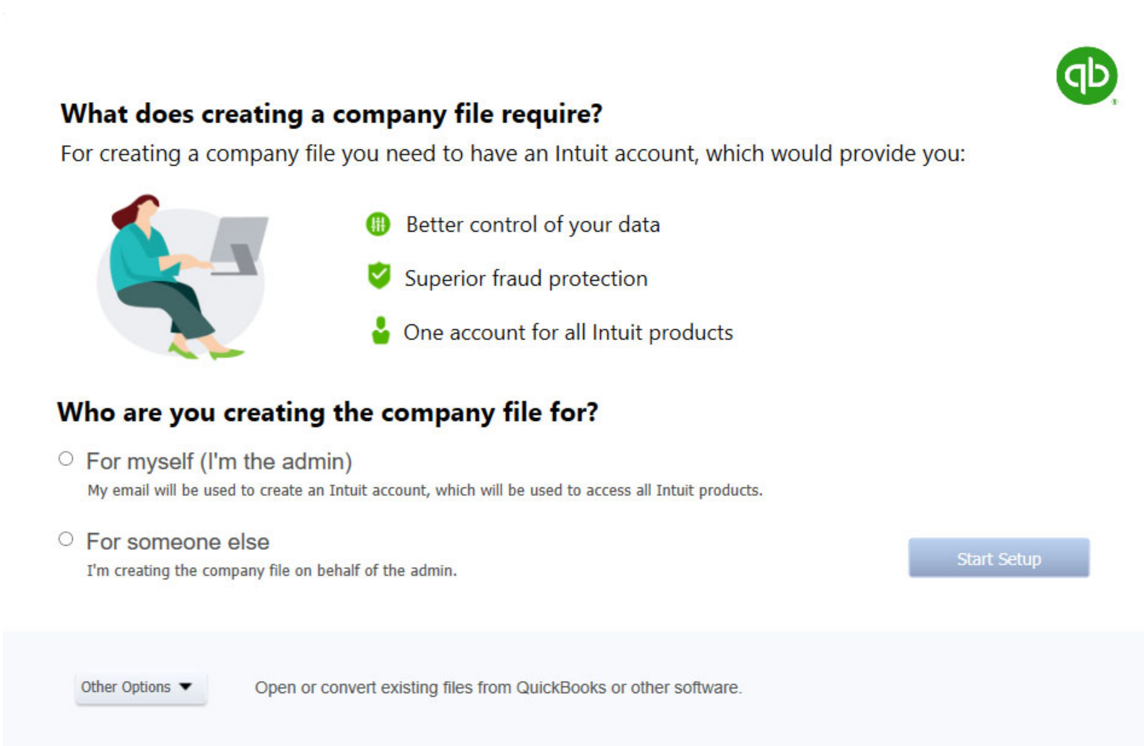
Pinnacle
FINANCIAL PARTNERS

QuickBooks Direct Connect

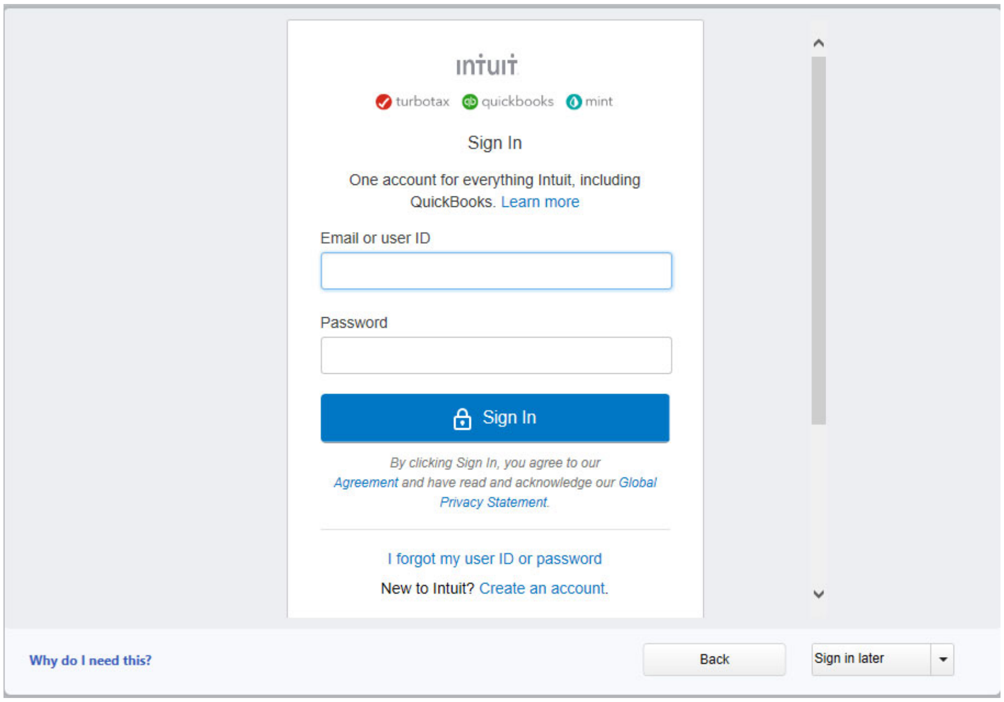
1. After opening QuickBooks®, select **Create a Company**. If you are already signed into QuickBooks® and have your company set up, start at **Step 6**.



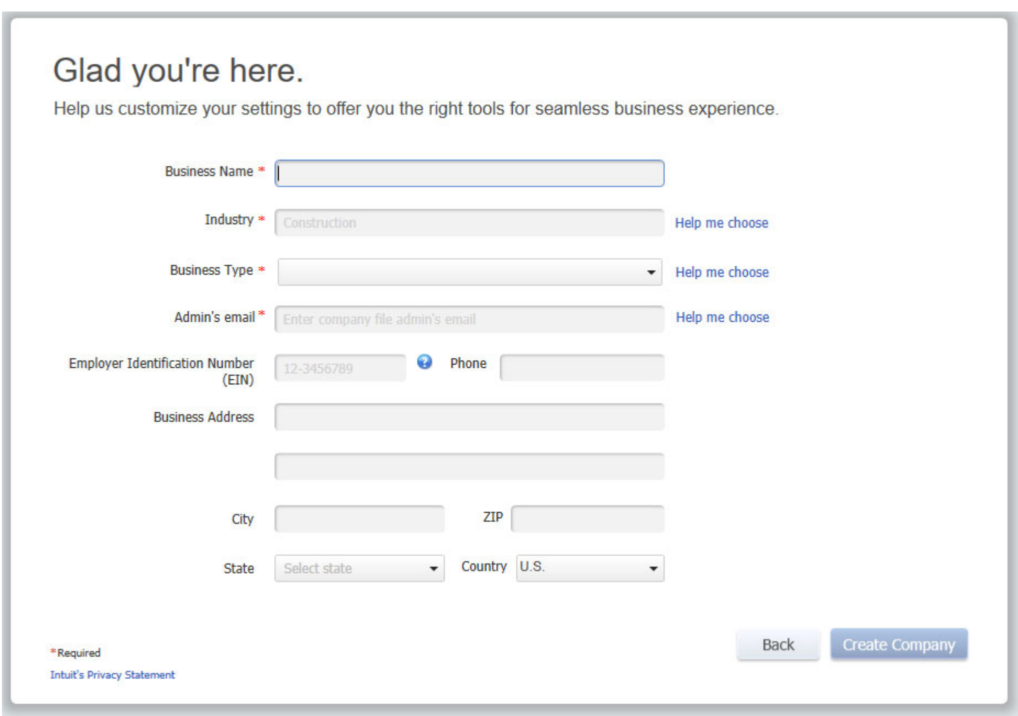
2. Select for whom you are creating the company file and then select **Start Setup.**



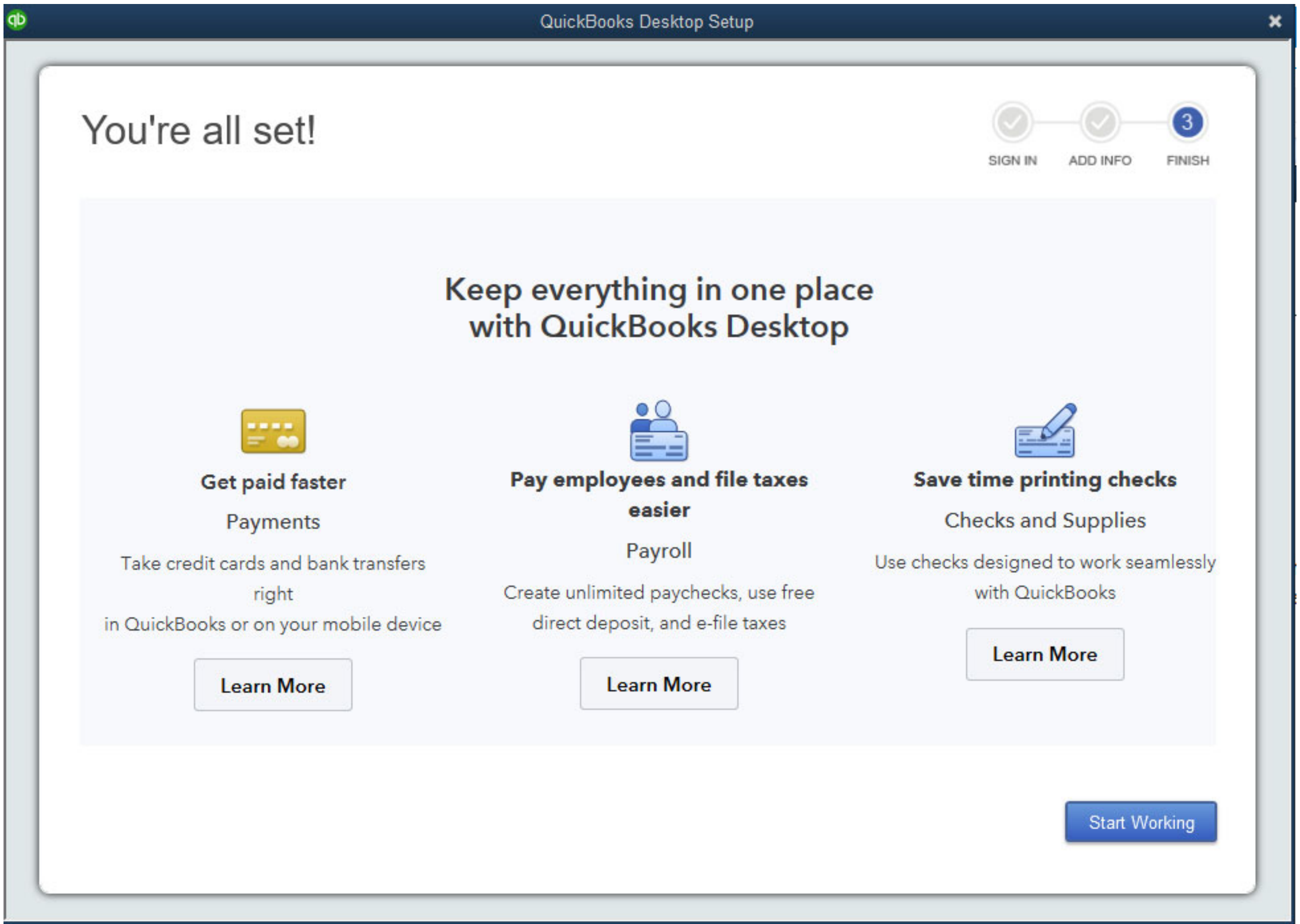
3. Sign in if you have an Intuit account, or you can sign in later.



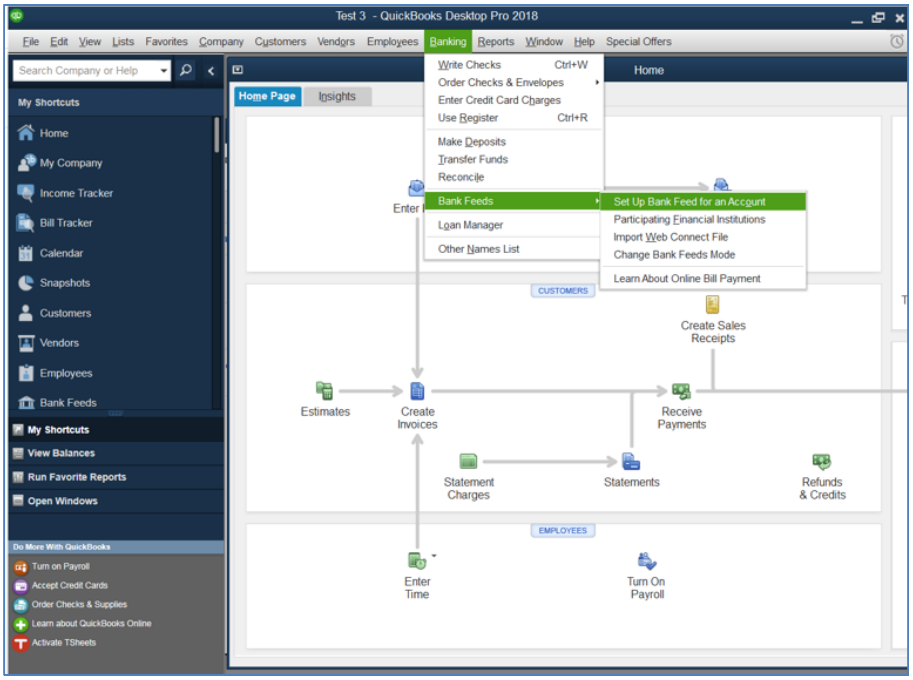
4. Fill out your company information and then select **Create Company**.



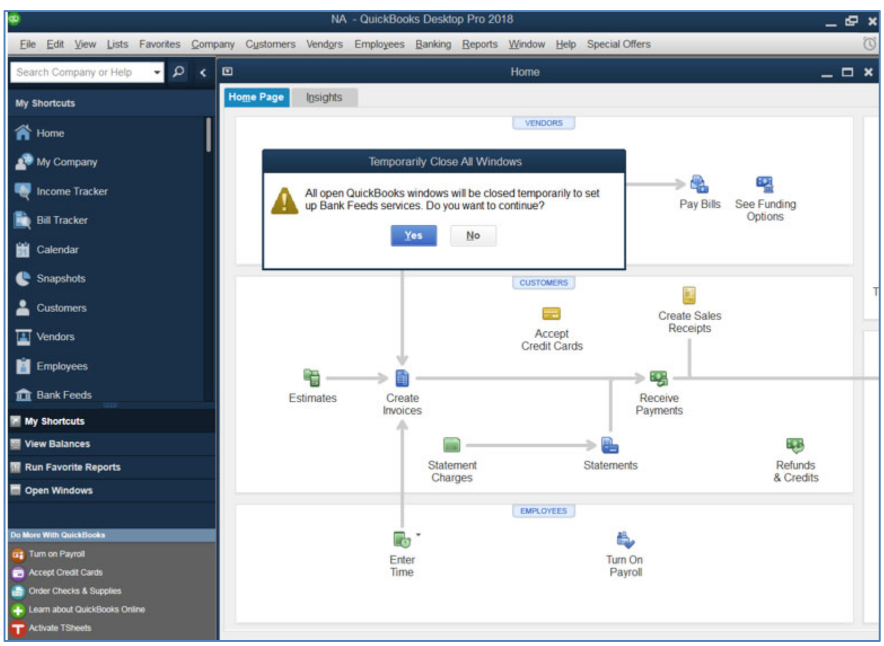
5. Select **Start Working.**



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.

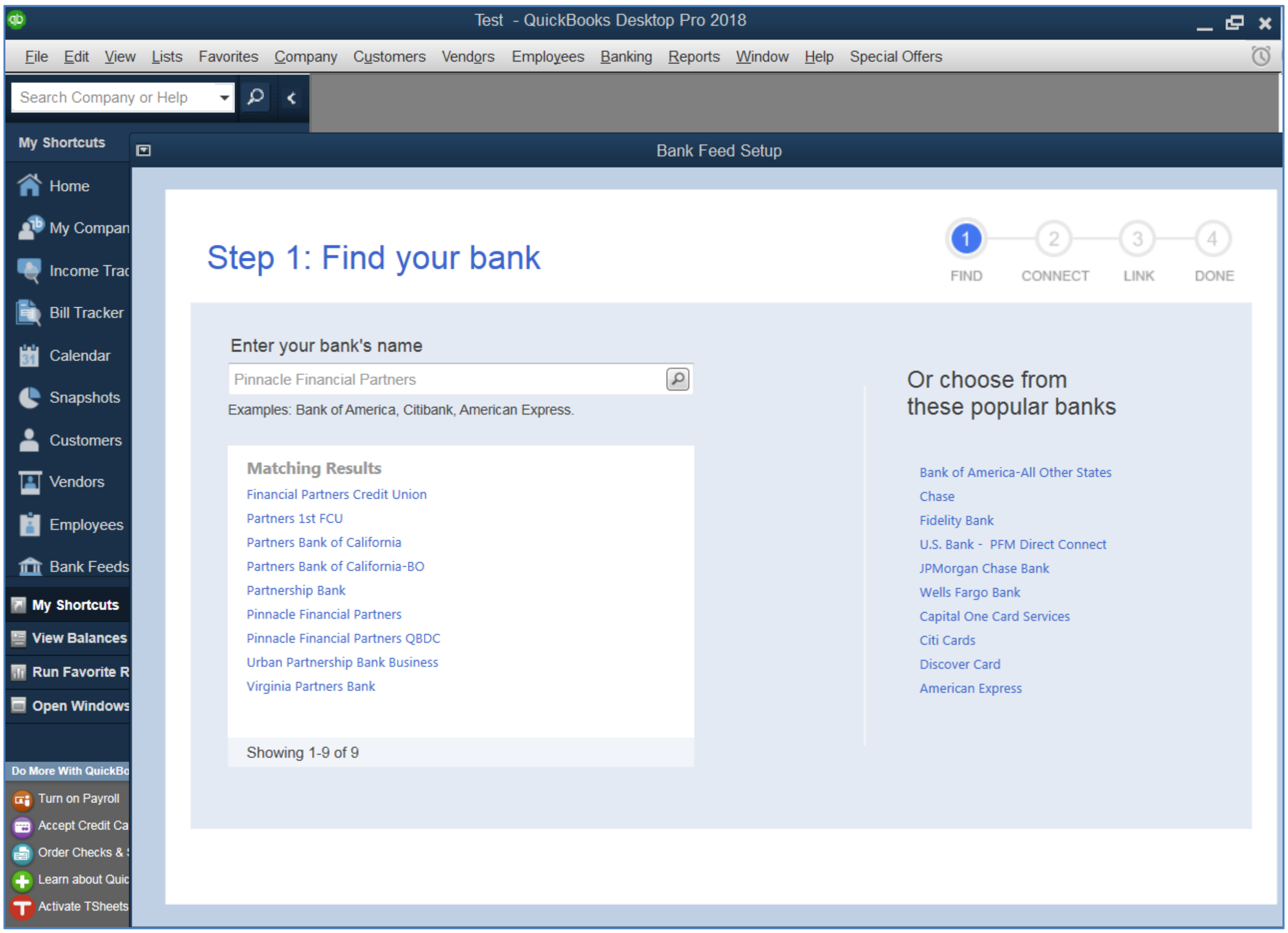


7. Yes, you want to continue.



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**).

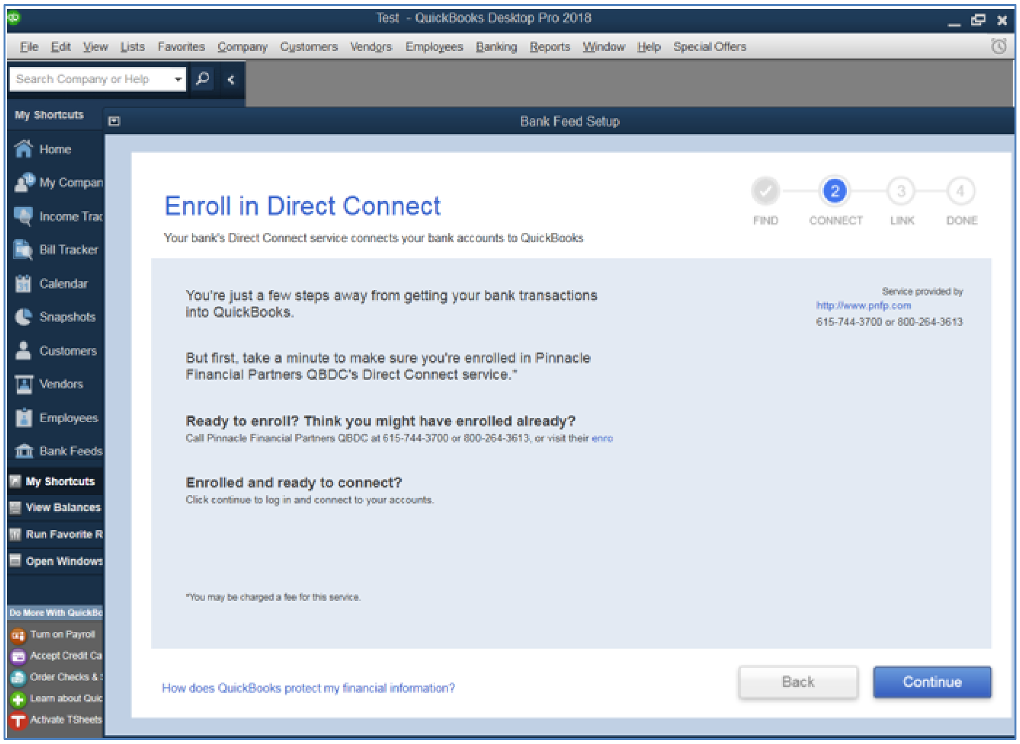
If you do not want to use the Direct Connect method and prefer to download the file manually, do this under the **History** tab in Pinnacle Online Banking.



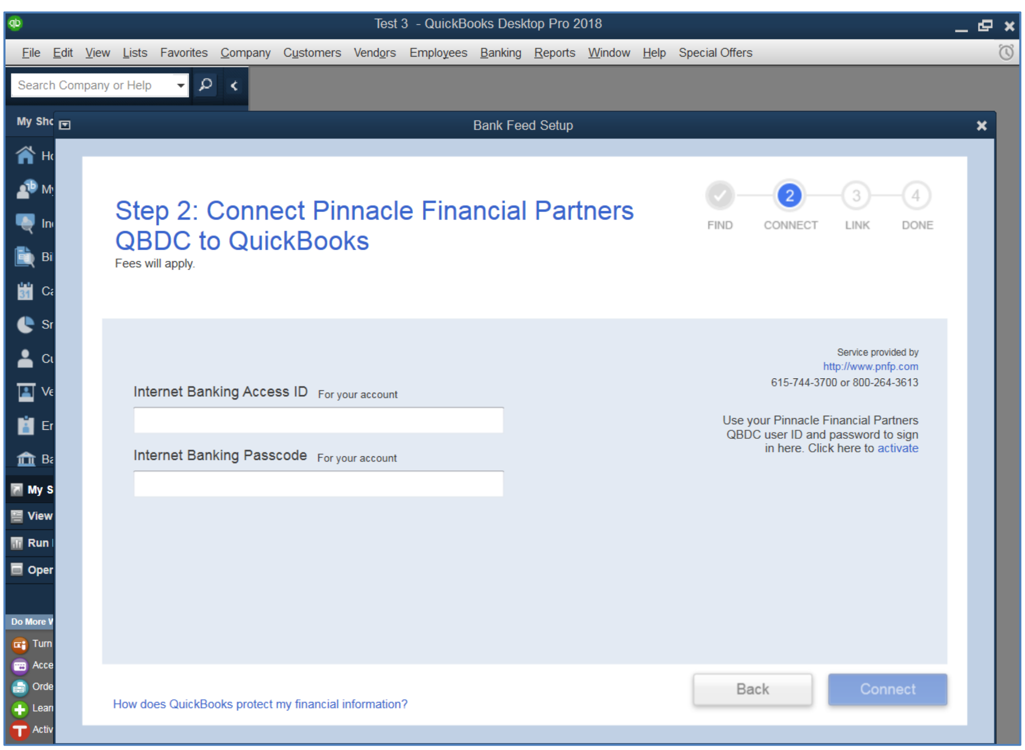
Member FDIC

Pinnacle FINANCIAL PARTNERS

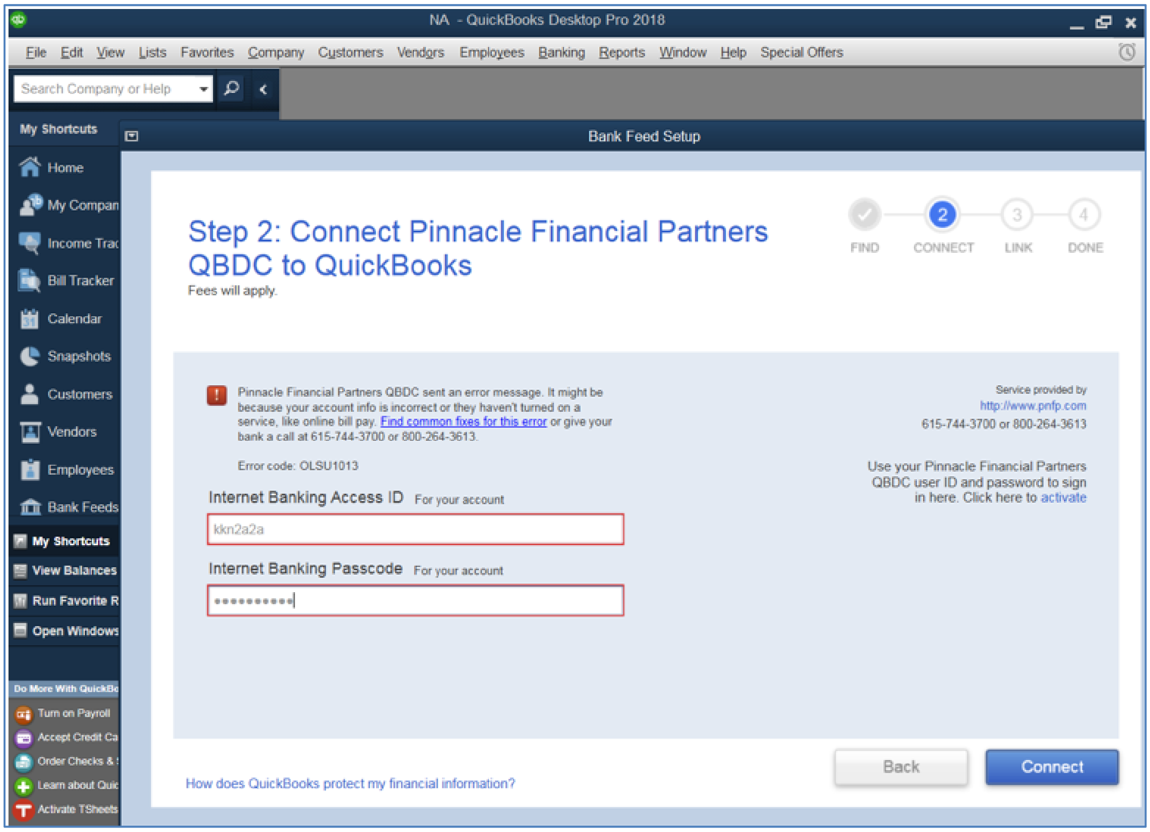
9. Select **Continue** to enroll in Direct Connect.



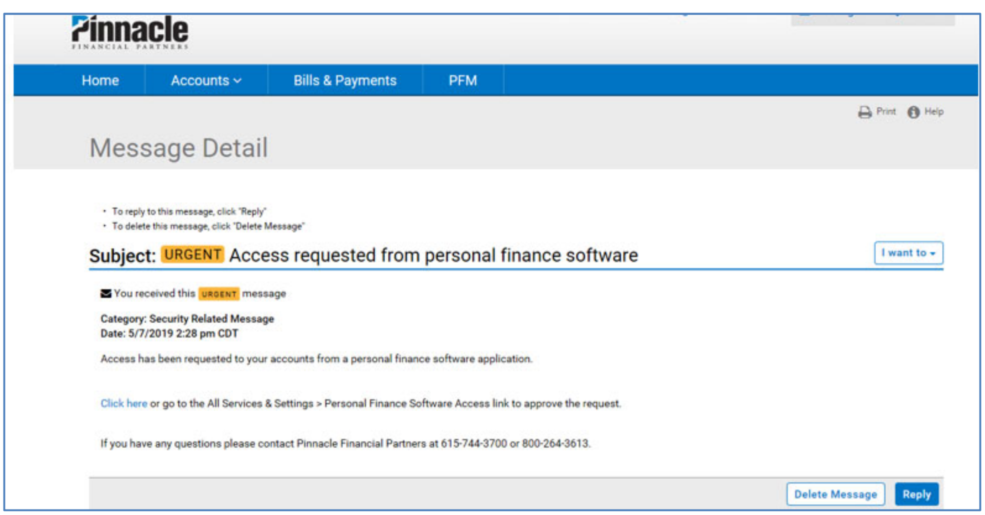
10. Enter your Access ID and password for your Pinnacle Online Banking, and then click **Connect**.

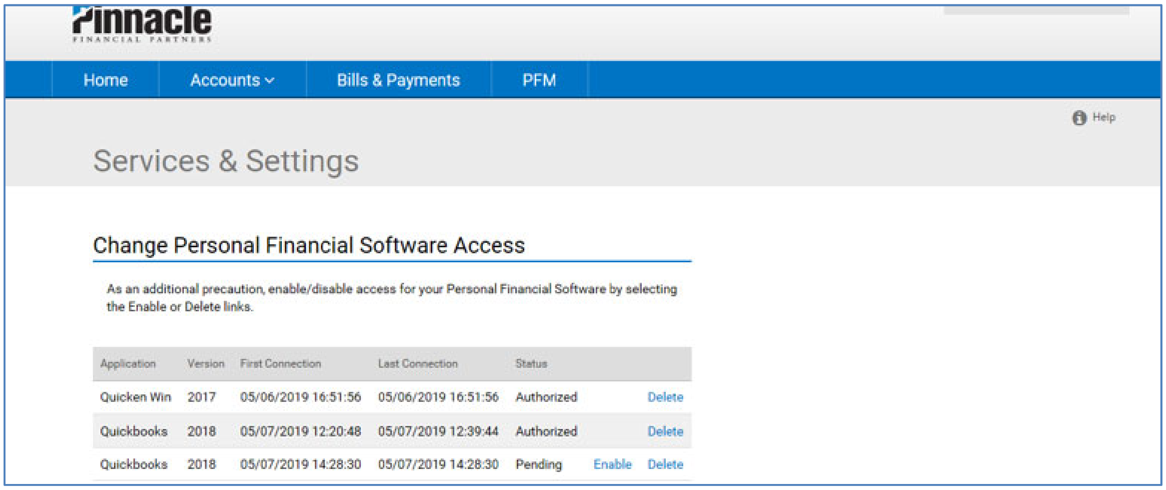


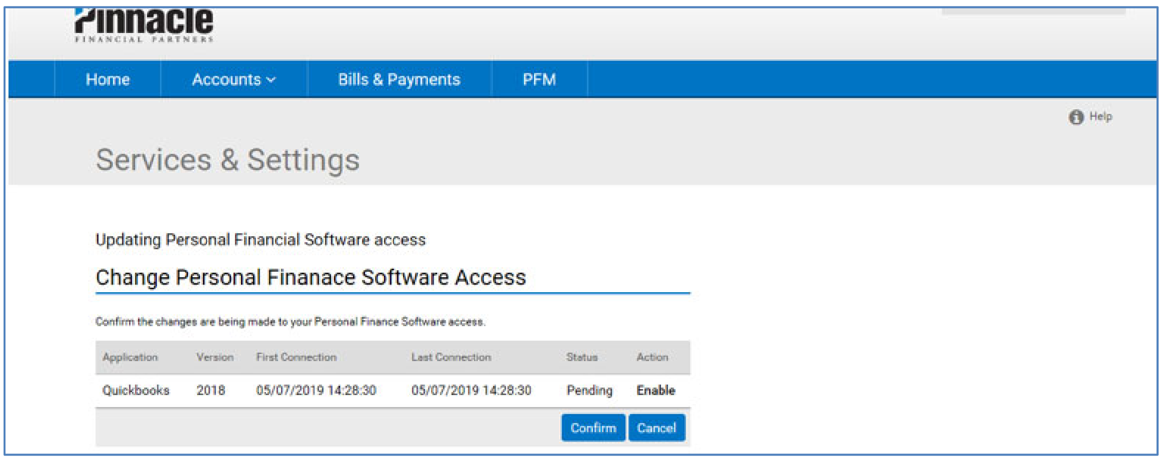
11. The first attempt at signing in might fail. If so, please log in to Pinnacle Online Banking to enable and confirm QuickBooks® access. You may log into Online Banking while in QuickBooks by selecting the **Click Here to Activate** option.



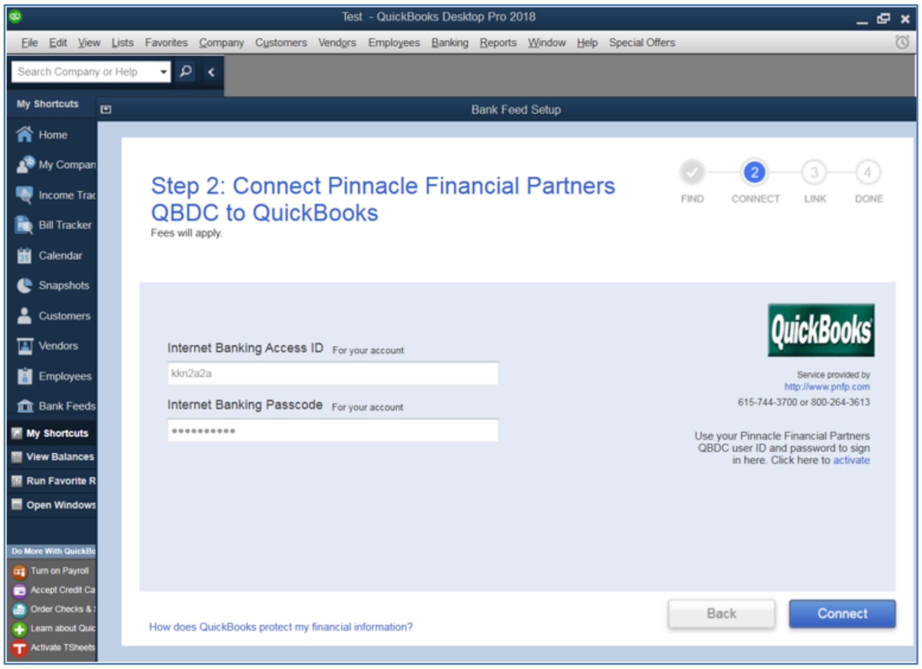
12. Once you are signed in, you should see a message notification titled **"Access Requested."** Open the message and follow the directions in the message received.



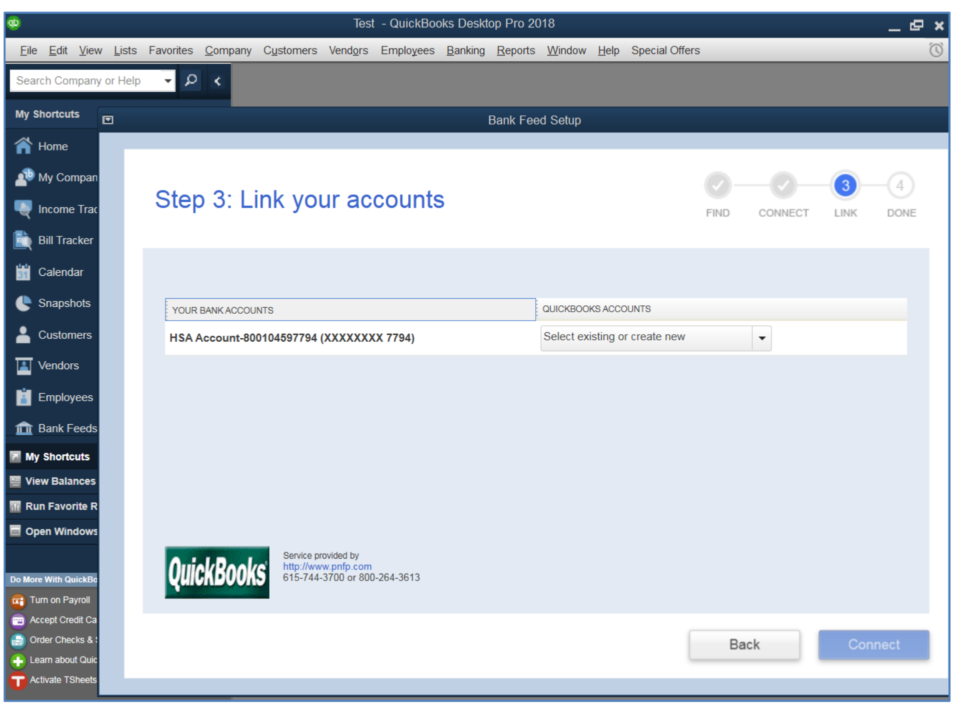

Pinnacle
FINANCIAL PARTNERS
Home
Accounts
Bills & Payments
PFM
Help
Services & Settings
Change Personal Financial Software Access
As an additional precaution, enable/disable access for your Personal Financial Software by selecting the Enable or Delete links.
Application
Version
First Connection
Last 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 Finanace 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

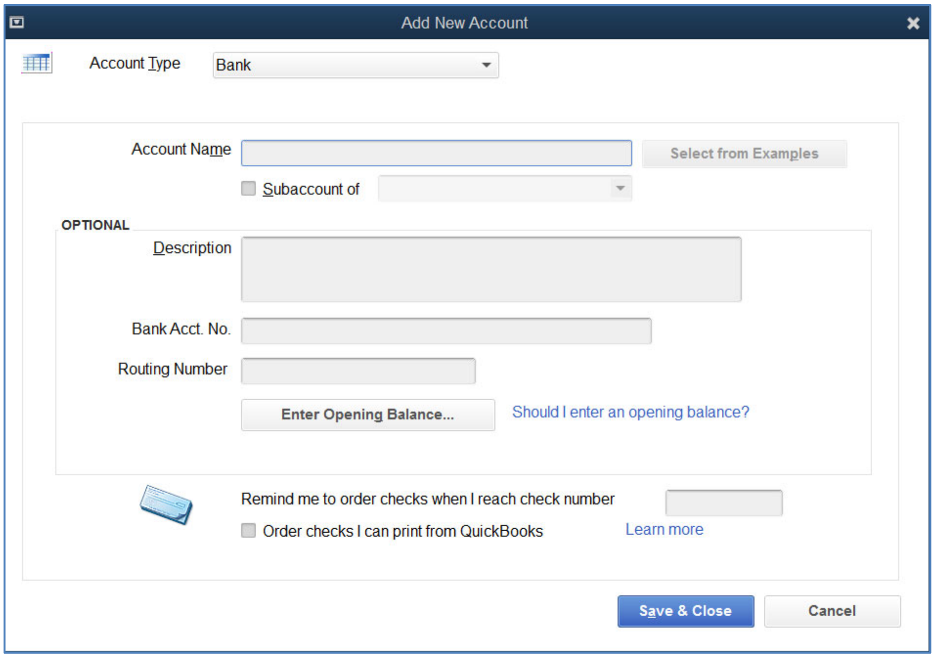
13. Clicking **Confirm** takes you back to **User Services**. Then go back into QuickBooks and log out of Online Banking, if you are finished there. Once you are back in QuickBooks, you will be back at the screen showing the error. Please click the **Back** button, which will take you back to the sign-in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



15. 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.**



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