

# QuickBooks Online

1. To get started, go to the Intuit QuickBooks® website at <https://quickbooks.intuit.com/login/>. Select your QuickBooks product to sign in.

## QuickBooks Products

[QuickBooks Online](#)

[QuickBooks Online Accountant](#)

[QuickBooks Self Employed](#)

[QuickBooks Desktop Accountant](#)

[QuickBooks Online Advanced](#)

[QuickBooks ProAdvisor](#)

[QuickBooks Enterprise](#)

[TSheets by QuickBooks](#)

[QuickBooks Payments](#)

[QuickBooks Backup](#)

## Other Intuit services

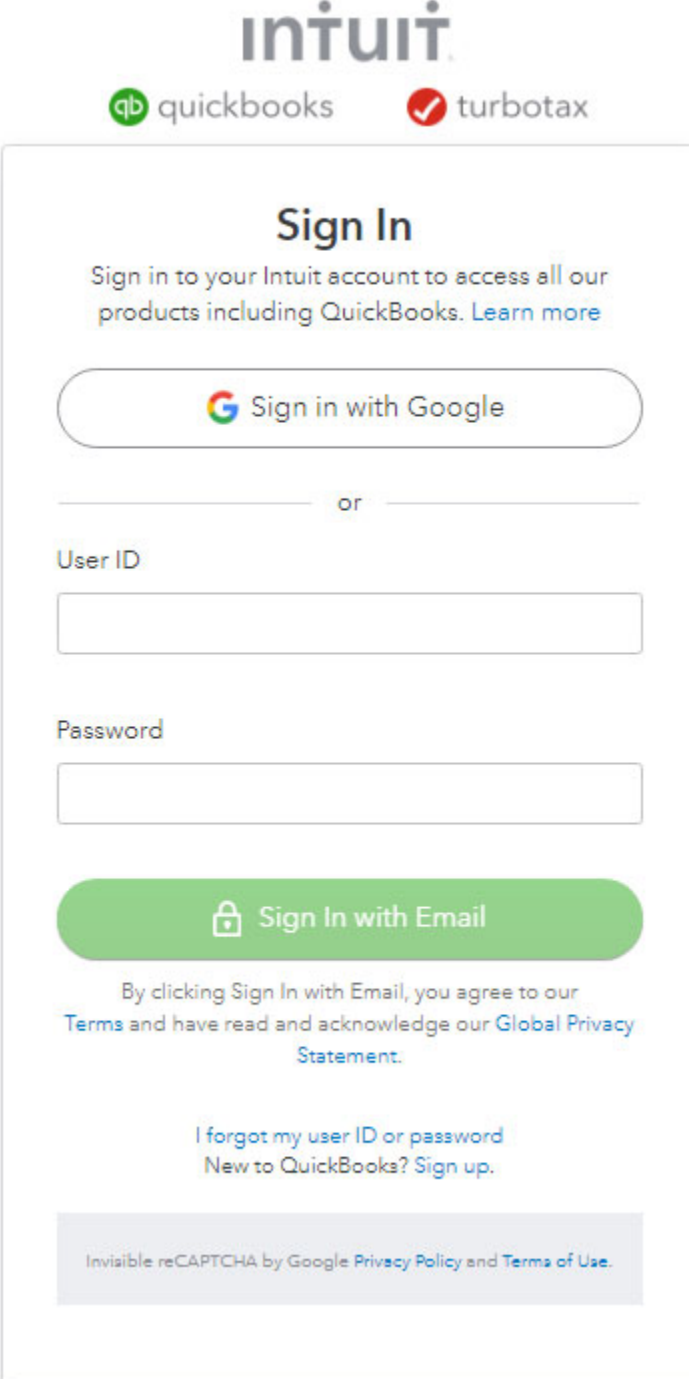
[QuickBooks Support](#)

[QuickBooks Community](#)

[Intuit Payroll](#)

[Need help signing in ?](#)

2. Sign in with your Intuit QuickBooks User ID and Password.




The image shows the Intuit sign-in page. At the top, the Intuit logo is displayed in a grey, lowercase font. Below it are two logos: 'qb quickbooks' with a green circle icon and 'turbotax' with a red checkmark icon. The main heading is 'Sign In' in a bold, black font. Below the heading is a sub-heading: 'Sign in to your Intuit account to access all our products including QuickBooks. [Learn more](#)'. There are two primary sign-in options: a rounded button with the Google logo and the text 'Sign in with Google', and a green rounded button with a lock icon and the text 'Sign In with Email'. Between these buttons is a horizontal line with the word 'or' centered. Below the 'Sign in with Google' button are two input fields: 'User ID' and 'Password'. Below the 'Sign In with Email' button is a paragraph of text: 'By clicking Sign In with Email, you agree to our [Terms](#) and have read and acknowledge our [Global Privacy Statement](#).' Below this text are two links: 'I forgot my user ID or password' and 'New to QuickBooks? Sign up.'. At the bottom of the form is a grey box containing the text: 'Invisible reCAPTCHA by Google [Privacy Policy](#) and [Terms of Use](#)'.

**intuit.**

qb quickbooks    ✓ turbotax

## Sign In


Sign in to your Intuit account to access all our products including QuickBooks. [Learn more](#)

 Sign in with Google

or

User ID

Password

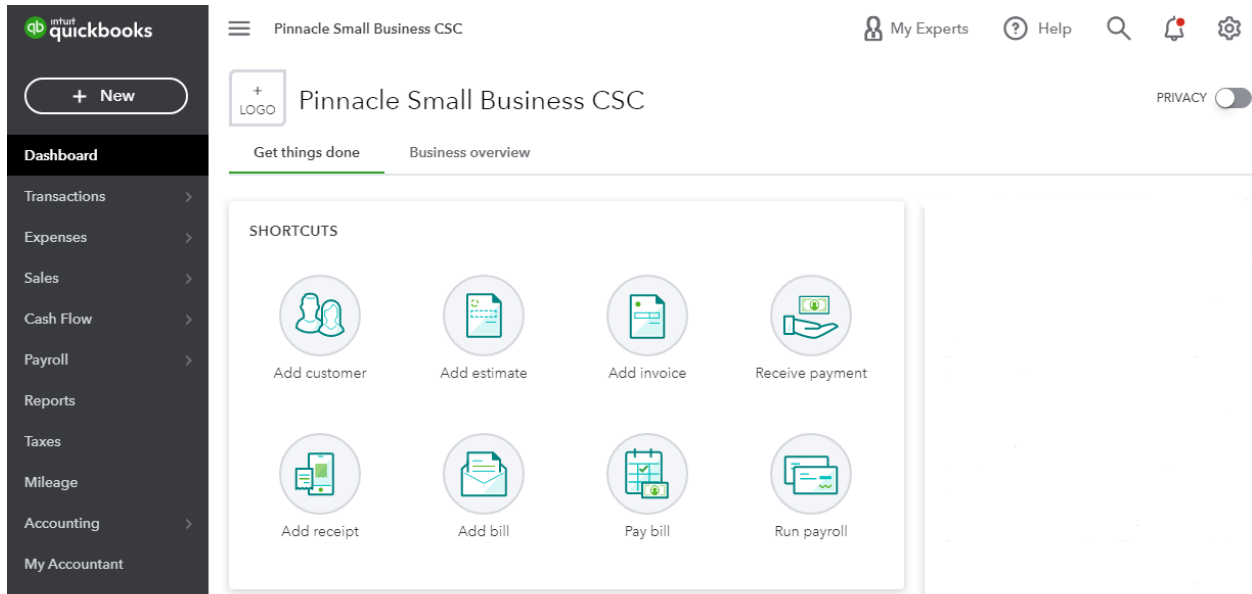
 Sign In with Email

By clicking Sign In with Email, you agree to our [Terms](#) and have read and acknowledge our [Global Privacy Statement](#).

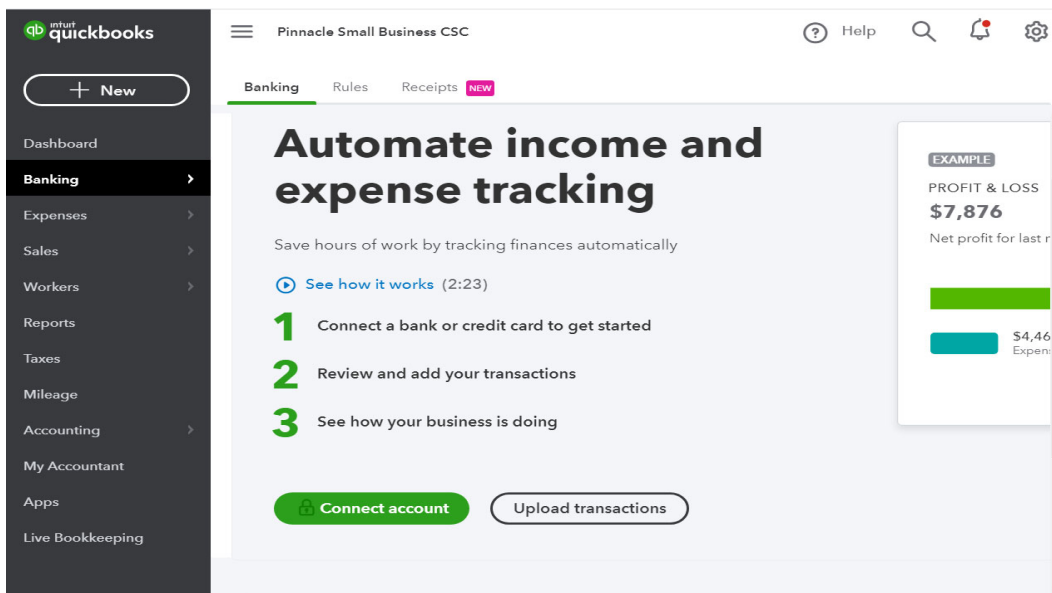
[I forgot my user ID or password](#)  
[New to QuickBooks? Sign up.](#)

Invisible reCAPTCHA by Google [Privacy Policy](#) and [Terms of Use](#)

3. Once you are logged in, QuickBooks will default to the application's **Dashboard** view.



4. Select **Banking** on the left column and select the option to **Connect Account**.











5. Enter **Pinnacle Financial Partners** into the search box.

Connect an account

Let's get a picture of your profits

Connect your bank or credit card to bring in your transactions.

Here are some of the most popular ones

At Intuit, the privacy and security of your information are top priorities.


6. Select **Pinnacle Financial Partners** in the search results.

Connect an account

Let's get a picture of your profits


Connect your bank or credit card to bring in your transactions.

418 results for *Pinnacle Financial Partners*

	<b>Pinnacle Financial Partners</b> www.pnfp.com
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7. Enter your Pinnacle online banking login credentials. Click **Continue**.

## Sign in to account



**Pinnacle Financial Partners**  
https://www.pnfp.com/  
1-866-404-6143

Access ID

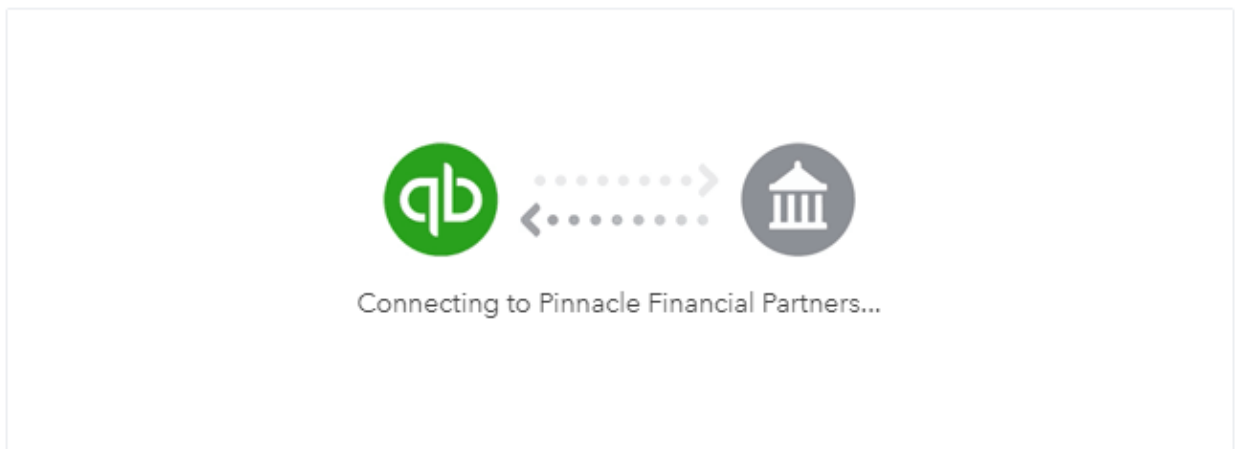
*This field is required*

Passcode

[SHOW](#)

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8. Screen will say “Connecting to Pinnacle Financial Partners.”



9. You may be prompted to answer a security question or choose a method to receive a verification code if this is a first-time connection.
10. Select the account(s) that you want to connect.

**Which accounts do you want to connect?**

**Checking -**  
Balance:  Enter account type

**Money Market -**  
Balance:  Enter account type

11. Select the matching accounts in the drop-down menu.

**Which accounts do you want to connect?**

**Checking -**  
Balance:  Enter account type

**Money Market -**  
Balance:  Enter account type

*(Note: A drop-down menu is open for the first 'Checking' account, showing options: '+ Add new', 'Checking Bank', and 'Pinnacle Checking Bank'. Red arrows point to the 'Checking Bank' and 'Pinnacle Checking Bank' options.)*

12. After accounts have been selected and matched, you can select the timeframe to pull transactions from or set custom date(s) from the drop-down. Then click **Connect**.

Which accounts do you want to connect?

Checking -  
Balance: Pinnacle Checking ✓

Money Market -  
Balance: Money Market ✓

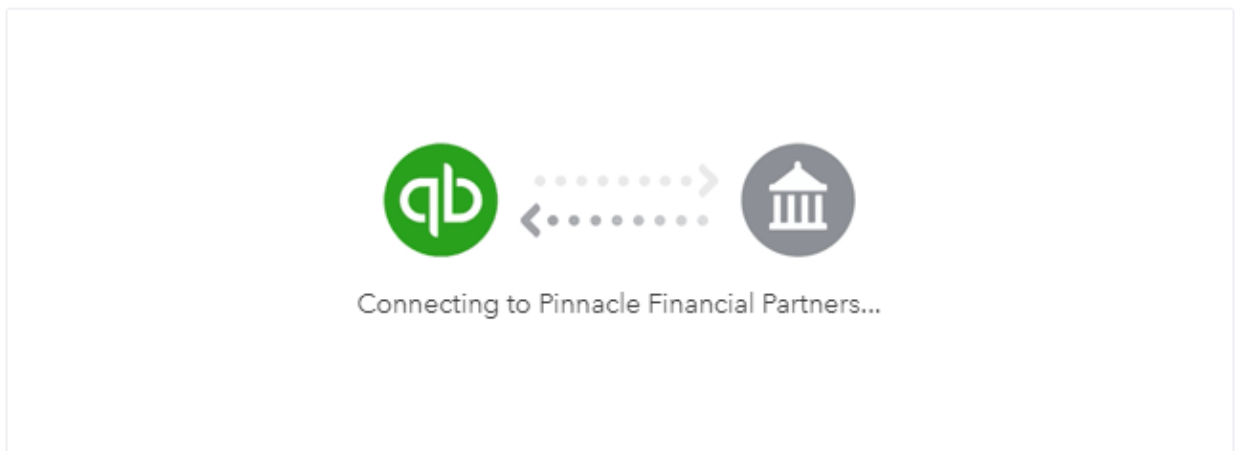
We will pull transactions from the selected accounts from 01/01/2019. Or you can select a different date to pull transactions from. Some bank limitations may apply.

Last year (01/01/2019) ▼

- Today (03/30/2020)
- This month (03/01/2020)
- This year (01/01/2020)
- Last year (01/01/2019)
- Custom...

Connect

13. The screen will say, "Connecting your bank... This could take a few minutes."



14. Then, “Bringing in your transactions... This could take a few minutes.”

## Bringing in your transactions

This will only take a moment.

Money in transactions



Money out transactions




15. And finally, “All set! You’re connected and ready to go.” After your transactions are finished loading it will take you to the screen below.

## See where your money goes

We started organizing your expenses by category. Did we get it right? If not, review categories to make changes.

EXPENSES BY CATEGORY DRAFT

Last 30 days



● Interest Paid	-\$2.37
● Bank Charges & Fees	-\$1.00
● Unassigned transactions	-\$2.00

Showing transactions from the accounts you just linked

**Why is this a draft?**  
We suggested categories based on what other businesses used. To get a more accurate report, start reviewing categories.

[Remind me later](#) [Review categories](#) [Link another account](#)