

## **QuickBooks Direct Connect**

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

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|      |      |      |       | Selec     | t a company     | that you've        | previously   | y opened a | nd click Op        | en          |        |           |        |            |      |     |   |
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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.

|                     | intuit  |      | ^               |
|---------------------|---|------|-----------------|
|                     | 🕜 turbotax 🔞 quickbooks 🚺 mint  |      |                 |
|                     | Sign In   |      |                 |
|                     | One account for everything Intuit, including<br>QuickBooks. Learn more  |      |                 |
|                     | Email or user ID  |      |                 |
|                     |   |      |                 |
|                     | Password  |      |                 |
|                     |   |      |                 |
|                     | 🔒 Sign In   |      |                 |
|                     | By clicking Sign In, you agree to our<br>Agreement and have read and acknowledge our Global<br>Privacy Statement. |      |                 |
|                     | I forgot my user ID or password   |      |                 |
|                     | New to Intuit? Create an account.   |      | ~               |
| Why do I need this? |   | Back | Sign in later 👻 |

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

| Business Name *                         | 1                                |            | ]              |  |
|---|----------------------------------|------------|----------------|--|
| Industry *                              | Construction                     |            | Help me choose |  |
| Business Type *                         |                                  | •          | Help me choose |  |
| Admin's email*                          | Enter company file admin's email |            | Help me choose |  |
| Employer Identification Number<br>(EIN) | 12-3456789 Ø Phor                | e          |                |  |
| Business Address                        |                                  |            |                |  |
|   |                                  |            |                |  |
| City                                    |                                  | ZIP        |                |  |
| State                                   | Select state - Co                | untry U.S. |                |  |





## 5. Select Start Working.

|   | QuickBooks Desktop Setup  |   |
|---|---|---|
| You're all set!   |   | SIGN IN ADD INFO FINISH                                   |
| ŀ   | Keep everything in one pla<br>with QuickBooks Desktop                               | ce  |
| Get paid faster<br>Payments   | Pay employees and file taxes<br>easier  | Save time printing checks                                 |
| Take credit cards and bank transfers<br>right<br>in QuickBooks or on your mobile device | Payroll<br>Create unlimited paychecks, use free<br>direct deposit, and e-file taxes | Use checks designed to work seamlessly<br>with QuickBooks |
| Learn More  | Learn More  |   |
|   |   | 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.

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| Search       | h Company                    | y or Help       | م -        | <                               |                         |                  |             |                 |                 |          |      |  |            |       |
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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<sup>®</sup> 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.

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| Quickbo            | oks 2018       | 05/07/2019 14:28:3                | 05/07/2019 14:28:30      | Pending         | Enable     | Delete |

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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.** 

|                  | Add New Account   | × |
|------------------|---|---|
| Account Type Bar | k 🔹   |   |
| Account Name     | Select from Examples  |   |
| OPTIONAL         |   |   |
| Description      |   |   |
| Bank Acct. No.   |   |   |
| Routing Number   |   |   |
|                  | Enter Opening Balance Should I enter an opening balance?  |   |
|                  | Remind me to order checks when I reach check number     Order checks I can print from QuickBooks     Learn more |   |
|                  | Save & Close Cancel   |   |

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



