# PACIFIC PREMIER BANK

# Quicken Essentials and Quicken Mac 2015 Conversion Instructions

*Quicken Essentials and Quicken Mac 2015*

*Web Connect*

## Table of Contents

# Introduction

As *Independence Bank* completes its system conversion to *Pacific Premier Bank,* you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your *[User ID and Password]* for the *Independence Bank* and *Pacific Premier Bank* websites.

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.

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| **IMPORTANT:** | These instructions are divided into **2 Phases** |

- **Phase 1 must** be completed **before [5:00pm PT, 4/09/2015].**

- **Phase 2 must** be completed **on or after [4/13/2015].**

**Phase 1**: This Phase is time sensitive and **must** be completed **before [5:00pm PT, 4/09/2015].**

# Documentation and Procedures

### Task 1:   Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up*, select **Backing up data files**, and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Updates*, select "Check for Updates," and follow the instructions.

### Task 2:   Connect to Independence Bank

1. Select your account under the **Accounts** list on the left side.

2. Choose **Accounts** menu > **Update Selected Online Account**.

3. Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

### Task 3: Deactivate Your Account(s) At Independence Bank

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Settings**.
3. Remove the checkmark from **I want to download transactions**.
4. Click **Save**.
5. Click **Continue** when asked to confirm this deactivation.
6. *Repeat steps 2 – 5 for each account at* ***Independence Bank.***

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**Phase 2**: This Phase is time sensitive and **must** be completed **on or after [4/13/2015].**

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### Task 4: Re-activate Your Account(s) at Pacific Premier Bank

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts** menu > **Update Selected Online Account**.
3. Enter *Pacific Premier Bank* in the Search field and click **Continue**.
4. Log in to *Pacific Premier Bank* web site at *https://www.ppbi.com.*
5. **Download** a file of your transactions to your computer.

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**IMPORTANT:** Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

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6. Drag and drop the downloaded file into the box **Drop download file**.

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**NOTE:** Select "Web Connect" for the "Connection Type" if prompted.

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7. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the **Action** column, select "**Link**" to pick your existing account.

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**IMPORTANT:** Do **NOT** select "**ADD**" under the action column.

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8. Click **Continue**.

*Thank you for making these important changes!*