PACIFIC PREMIER
BANK

Quicken for Windows Conversion Instructions

Quicken for Windows 2012-2015

Express Web Connect

Table of Contents

PACIFIC PREMIER BANK

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.

NOTE:	For Quicken Web Connect/Express Web Connect accounts, use the same User ID and PIN/Password as your financial institution website. For Direct Connect, the login credentials may be different. Please contact your financial institution to verify your Direct Connect login information.

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.

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

- **Phase 1 must** be completed **before [5:00pm PT, 4/09/2018].**
- **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 > **Quicken Help**. Search for ***Backup Data File*** and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Quicken Help**. Search for ***Update Software*** and follow the instructions.

Task 2: Connect to Independence Bank

1. Choose **Tools** menu > **One Step Update**.
2. Depending on how you manage financial institution passwords, you may be prompted to enter your Vault password at this time or to enter individual passwords in the One Step Update dialog.

3. In the **One Step Update Settings** dialog, make sure all items are checked and click **Update Now**.
4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE:	If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

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

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate.** Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps 2—6 for each account at ***Independence Bank***.

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

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

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the Account Details dialog, click on the **Online Services tab**.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter ***Pacific Premier Bank*** and click **Next**.
7. On the Select Connection Method screen, select **Express Web Connect**.
8. Type your **User ID** and **Password**. Click **Connect**.

NOTE:	You may be presented with a security question from your Financial Institutions prior to receiving your accounts.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching accounts in the drop-down menu.

IMPORTANT:	Do **NOT** select **Add to Quicken**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your account(s) have been added.
11. Click **Done** or **Finish**.

Thank you for making these important changes!