# QuickBooks® for **Windows**

PACIFIC PREMIER BANK®

Connect and Update Your Data

Before you set QuickBooks to connect your accounts from Pacific Premier Bank, you will need the following information:
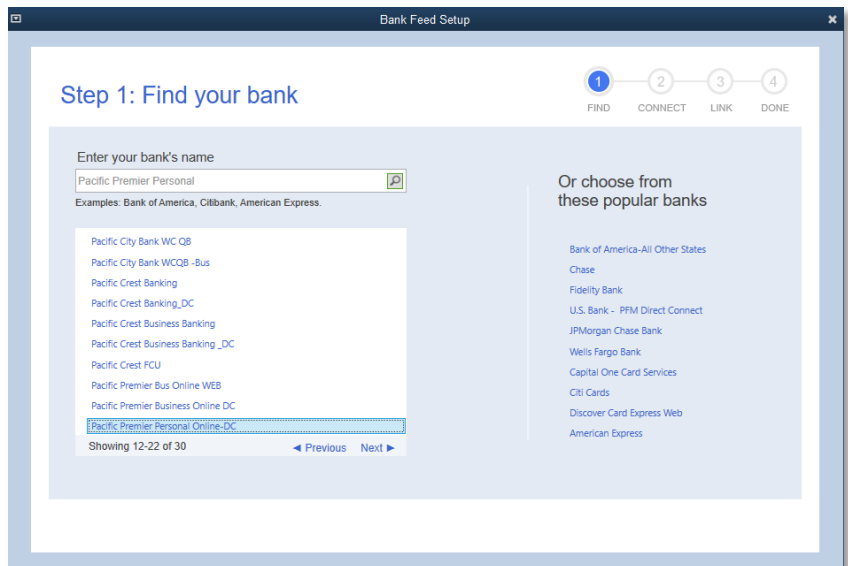
- Pacific Premier Personal Online Banking Username

- Password

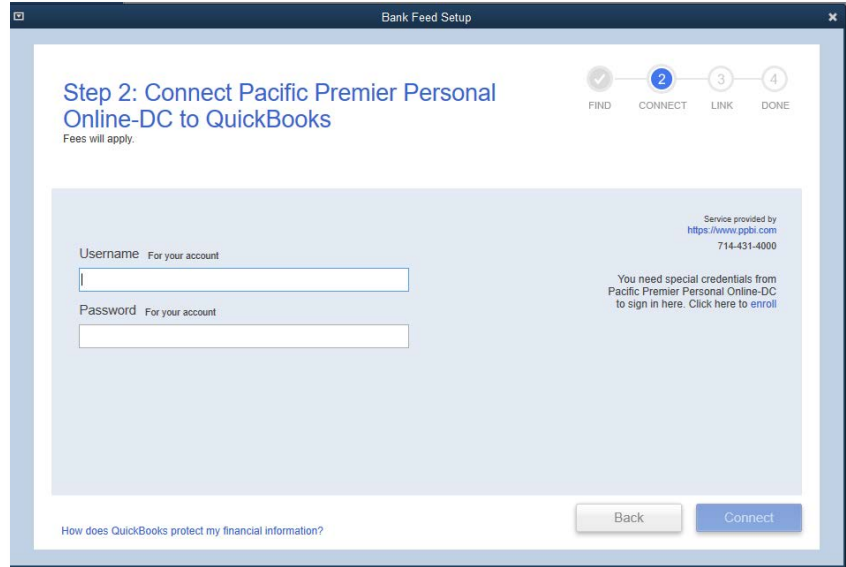## Set Up an Account for Pacific Premier Personal Online (Direct Connect)

1. On the Home page under **Banking**, select **Bank Feeds** and click **Set Up Bank Feed for an Account**.
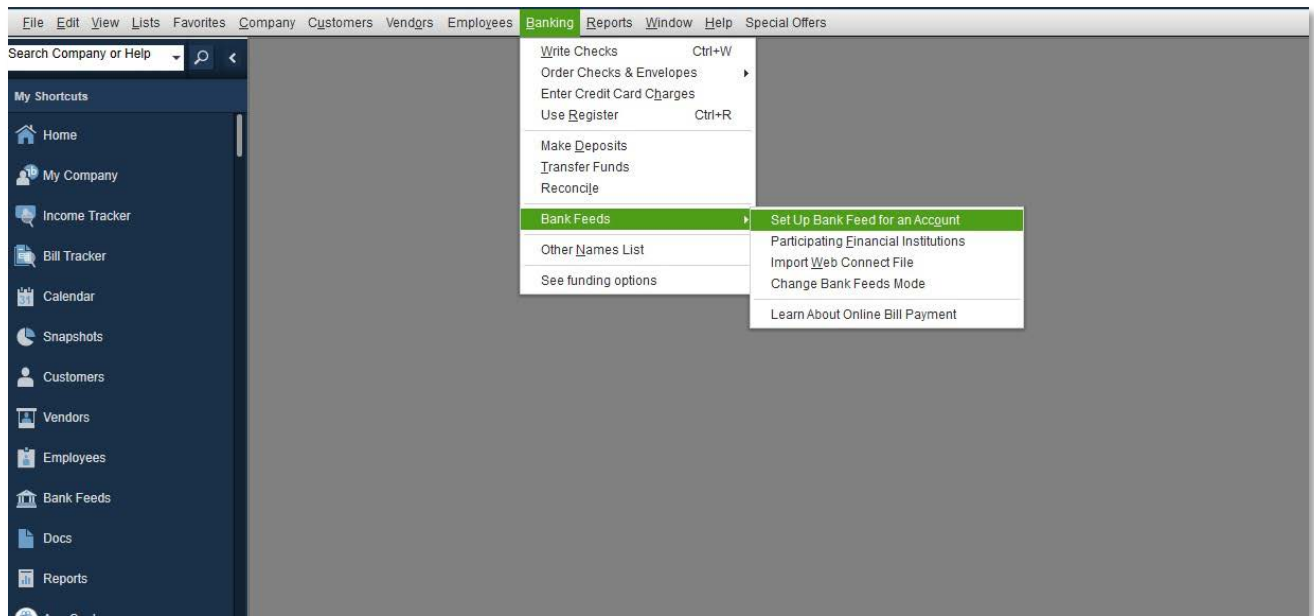
2. On Step 1: Find your bank screen, enter **Pacific Premier Personal** and select **Pacific Premier Personal Online-DC**.
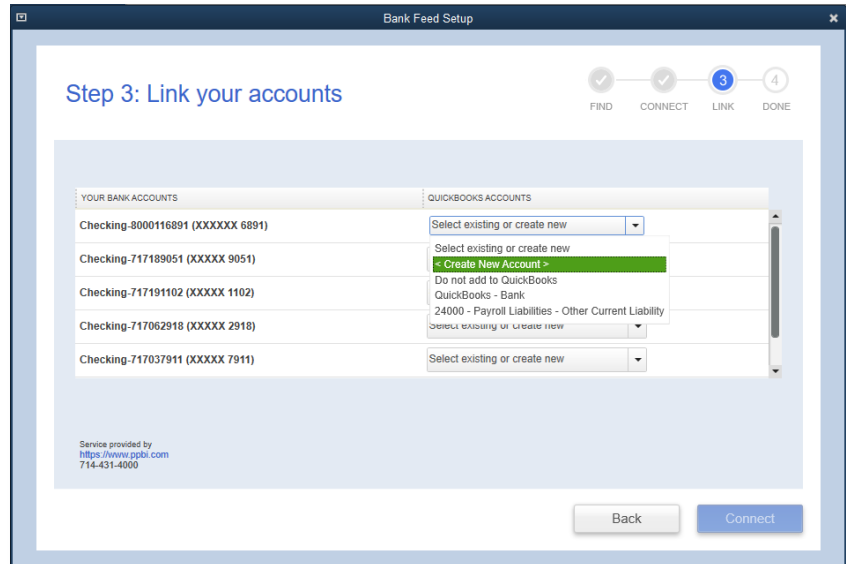
**3.** Enter your Pacific Premier Personal Online login credentials and click **Connect**.

4. After you connect, you will see all accounts at Pacific Premier Bank that you can add to QuickBooks. If you don't have an account ready in QuickBooks, click **Create New Account** to create a new account. If you don't want to download data from a particular account, choose **Do not add to QuickBooks** from the drop-down menu.

**5.** After you add your accounts, click **Connect**.

Set Up an Account for Pacific Premier Personal Online (Web Connect)

1. Log into Pacific Premier Personal Online through the Pacific Premier Bank website (www.ppbi.com)

2. Download account transactions using the **QuickBooks Web Connect (*.QBO)** format, and save the file to your computer.

3. Open QuickBooks. On the Home page under **Banking**, select **Bank Feeds** and click **Import Web Connect File**.
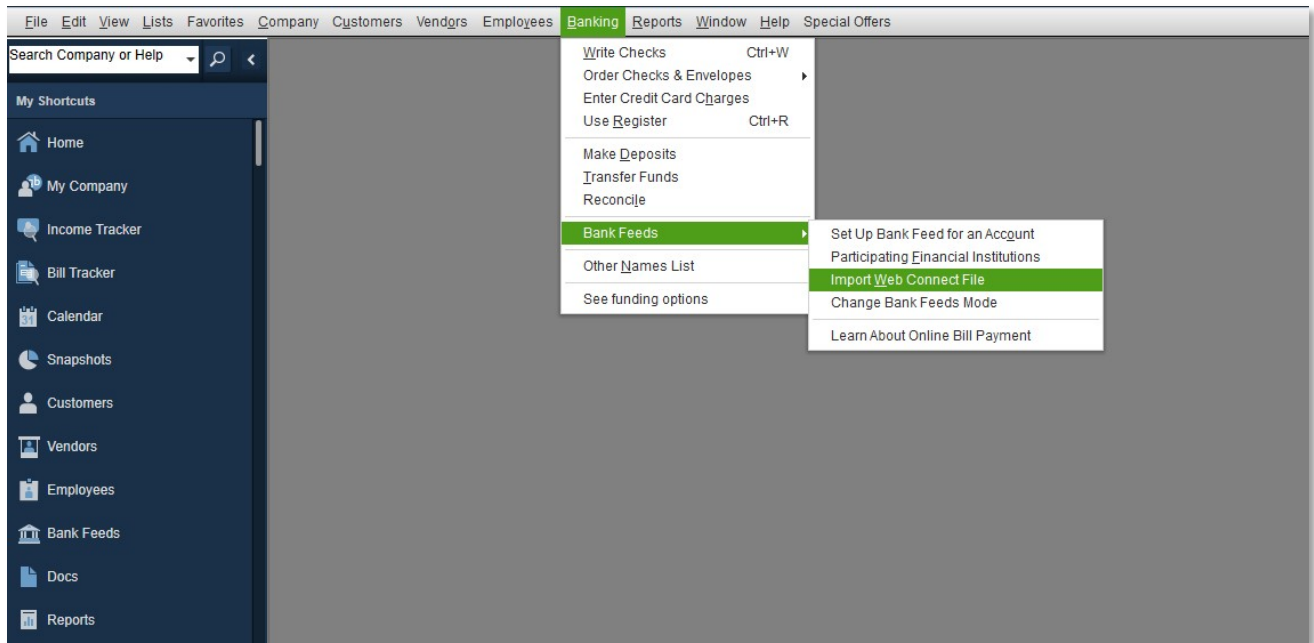
4. You will see an import dialog box.
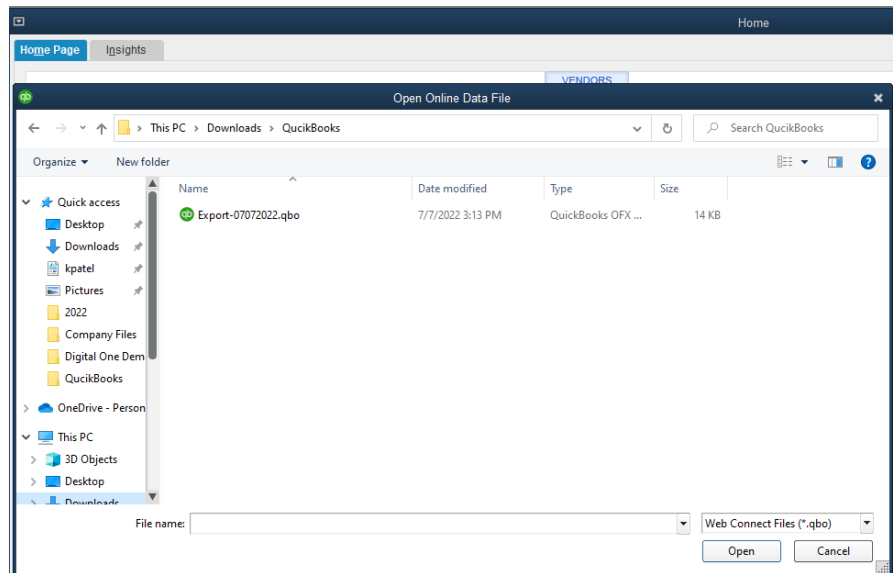
5. Navigate to and select the file you downloaded in Step 2, then click **Open**.

> You will see a dialog box like the one to the right with your Pacific Premier information.

Select Bank Account

You are downloading transactions for the following account:

- Financial Institution: Pacific Premier Bus Online WEB
- Account type: Checking
- Account number: 717191102

QuickBooks does not have an online account to handle these transactions. Please make a selection below.

- ◉ Use an existing QuickBooks account [▼]
- ○ Create a new QuickBooks account Checking at Pacific Premier Bu

Cancel   Continue

6. Click **Use an existing QuickBooks account** if you have an appropriate account in the Chart of Accounts. If you don't have an account yet, click **Create a new QuickBooks account** and enter a name for that account.

7. Click **Continue**.

8. Click **OK** to confirm and finish.

Questions? Contact our Client Services at 855.343.4070.