

# Quicken® for Mac

Getting Started Guide for Pacific Premier Business<sup>SM</sup> Online Users



PACIFIC PREMIER BANK®

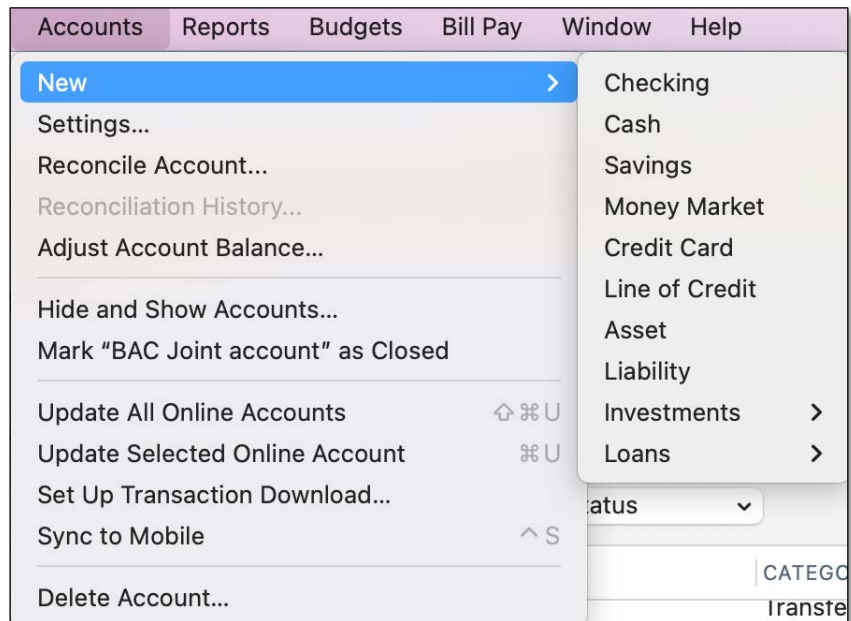
# Connect and Update Your Data

Before you set Quicken to download transactions from Pacific Premier Bank, you will need the following information:

- Pacific Premier Business Online Company ID and Username
- Password

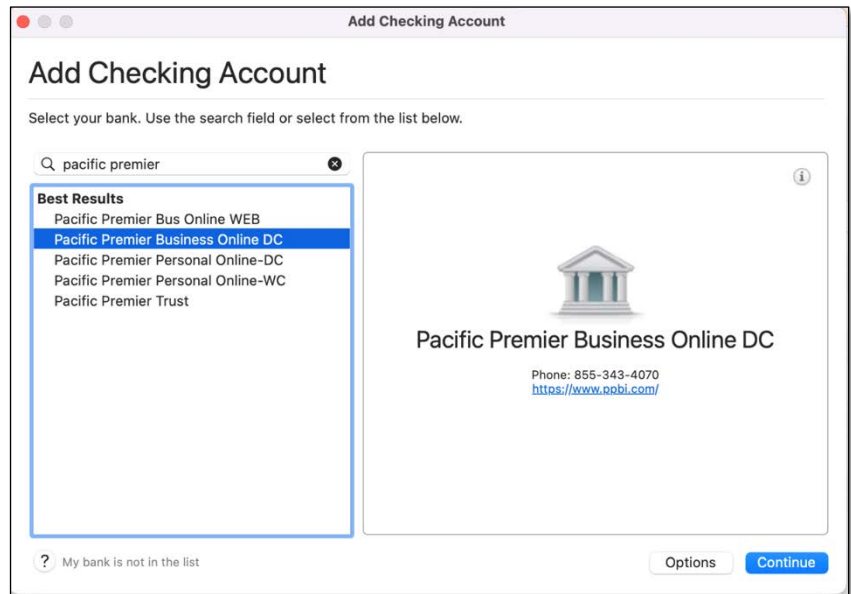
## Set Up an Account for Pacific Premier Business Online (Direct Connect)

1. Choose **Accounts > New**.
2. Click the type of account you want to set up. For example, you can choose a Checking account.



3. After you choose the type of account you want to add, you will see the financial institution selection screen. Enter **Pacific Premier Bank** and select **Pacific Premier Business Online DC**, then click **Continue**.

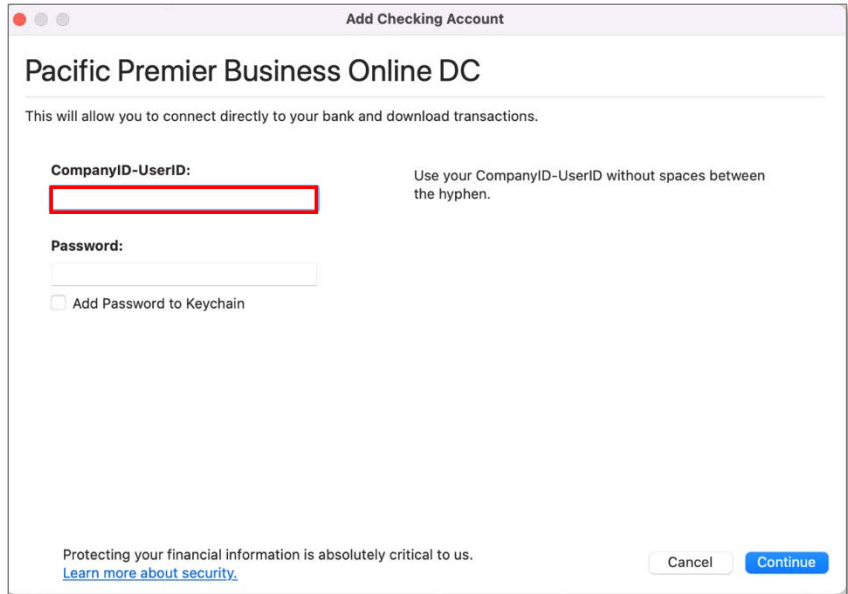
**NOTE:** You may be asked from the connectivity selection screen to select **Direct Connect** and click **Continue**.



4. Enter your Online Banking Login credentials and click **Connect**.

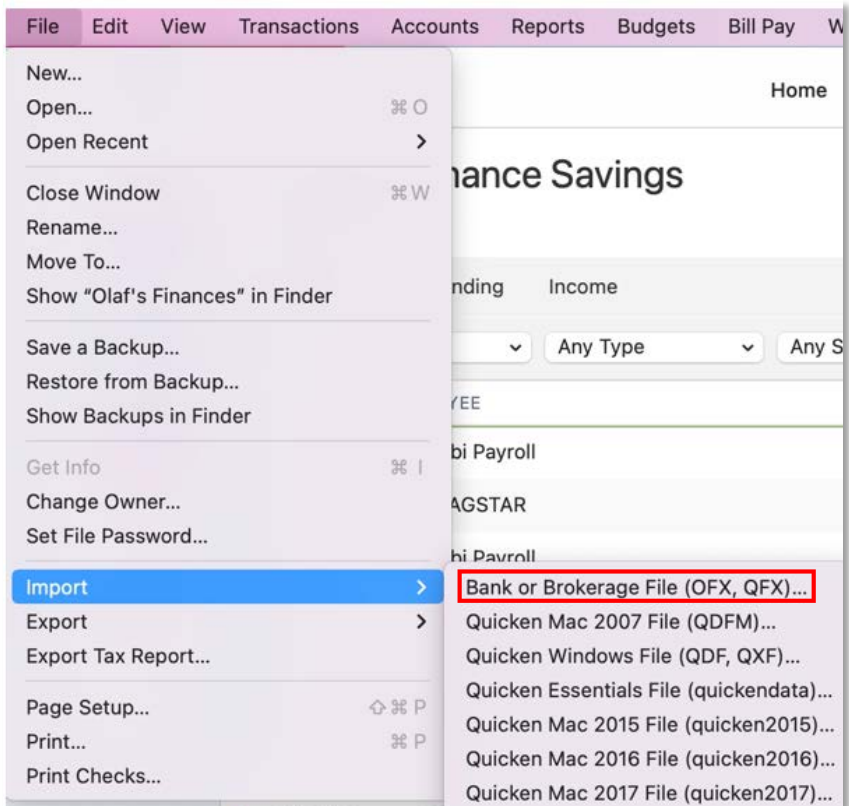
In the first box, be sure to enter your **CompanyID-UserID** as shown.

5. After successfully logging in, your Quicken software will prompt you to add your accounts. Follow the prompts to add your account to your Quicken system.



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

1. Log into your online access through the Pacific Premier Pacific Bank website ([www.ppbi.com](http://www.ppbi.com)).
2. Download your transactions using the **Quicken Web Connect (\*.QFX)** format and save the file to your computer.
3. Open Quicken, then choose **File > Import > Bank or Brokerage File (OFX, QFX)....** You will see a navigation window.
4. Navigate to the file you downloaded in Step 2, then click **Open**.
5. Click **Link an Existing Account** if you have an appropriate account in the account list. If you don't have an account yet, click **Create a new account** and enter a nickname for that account.
6. Click **Import**.
7. Click **OK** to confirm and finish.



**Questions?** Contact our Client Services at 855.343.4070.