

QuickBooks® for Mac

Getting Started Guide for Pacific Premier BusinessSM Online Users



PACIFIC PREMIER BANK®

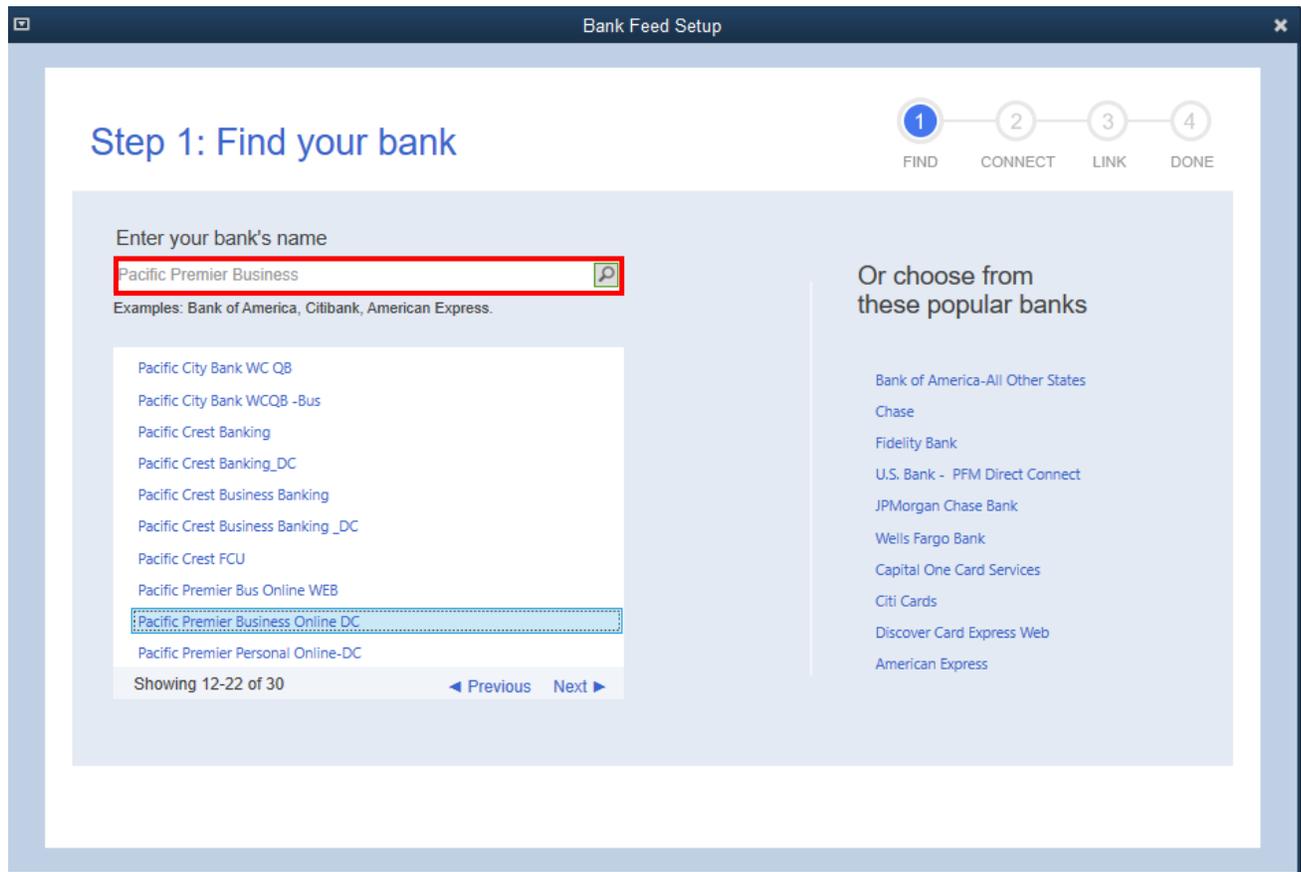
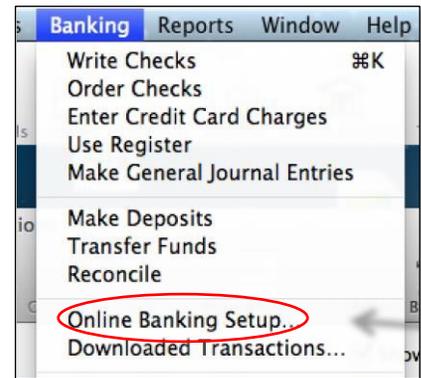
Connect and Update Your Data

Before you set QuickBooks to connect your accounts from Pacific Premier Bank, you will need the following information:

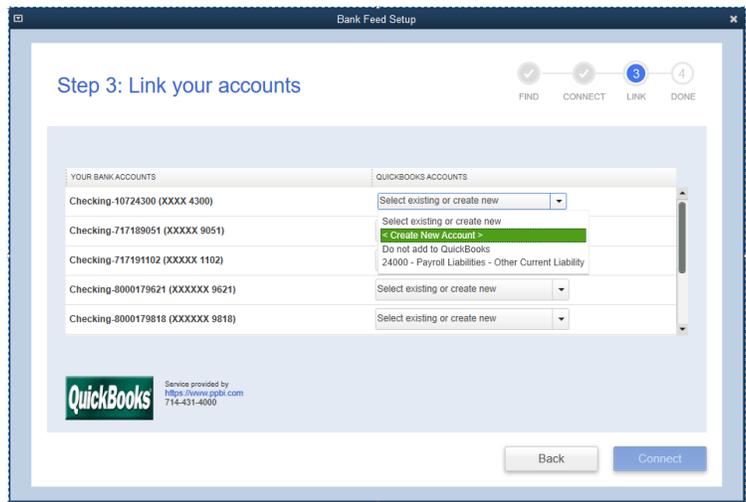
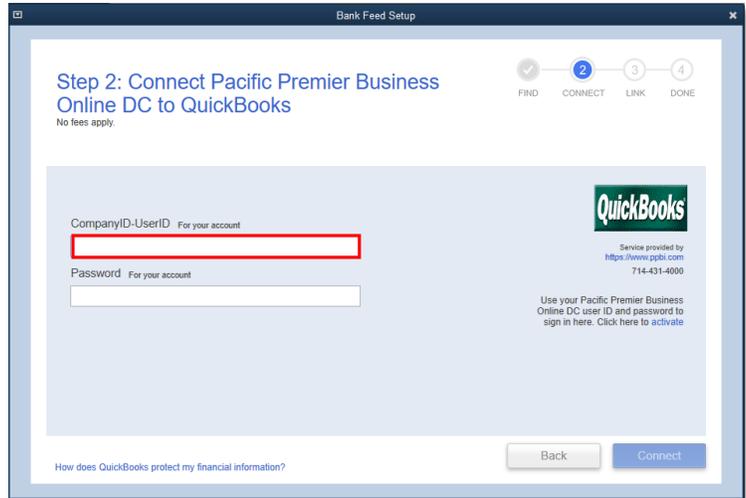
- Pacific Premier Business Online Company ID and Username
- Password

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

1. Go to **Banking**, select **Online Banking Setup...**, then **Set Up Account for Online Services**.
2. Click the **Select your QuickBooks account** drop-down arrow, and select the QuickBooks account that will connect to your Financial Institution, then click **Next**.
3. Enter **Pacific Premier Business**, select **Pacific Premier Business Online DC**, click **Next**.

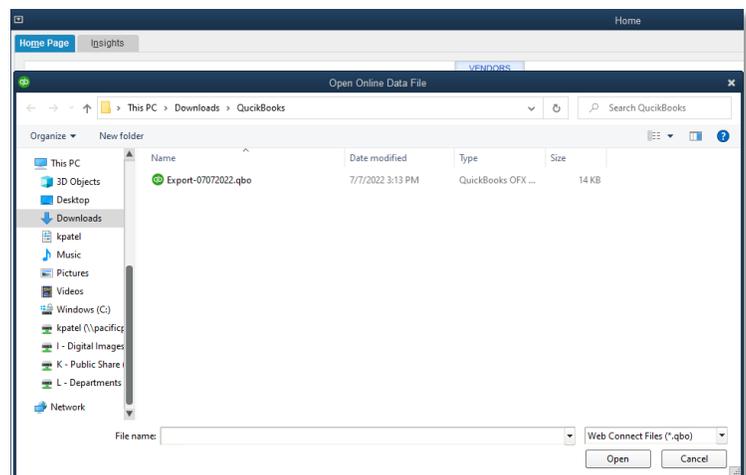


- Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
- The Online Banking Assistant window displays during setup. Select **Yes, my account has been activated for QuickBooks online services**, then click **Next**.
- Enter your Pacific Premier Business Online login credentials to sign in to your Financial Institution.
- Click **Sign In**. QuickBooks will connect to the bank's server to download bank data for the selected account.
- For each account you wish to download into QuickBooks, click **Select an Account** to connect to the appropriate existing account register or create a new account within QuickBooks.
- Click **Finish** after the download completes. You have successfully activated online banking.



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

- Log into your online access through the Pacific Premier Bank website (www.ppbi.com).
- Download account transactions using the **QuickBooks Web Connect (*.QBO)** format, and save the file to your computer.
- Open QuickBooks and then choose the **Banking** menu > **Downloaded Transactions** > **Import File**. You will see an import dialog box.



4. Navigate to and select the file you downloaded in Step 1, then click **Open**.

You will see a dialog box like the one on the page below with your Pacific Premier Bank accounts listed.

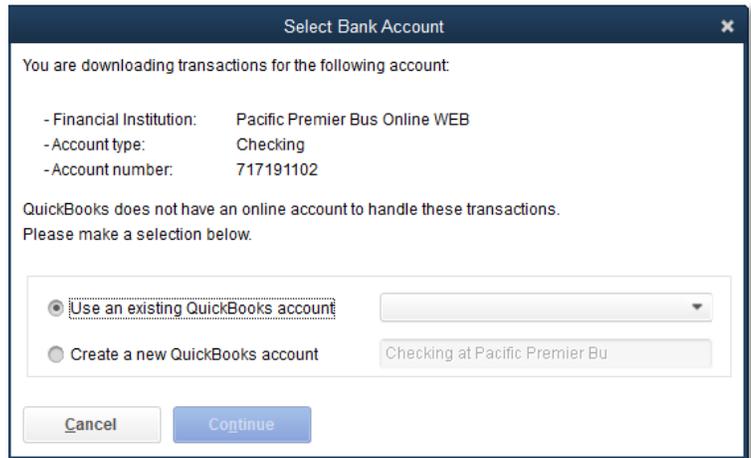
5. Click on **Select an Account** for each account and choose which account in QuickBooks to connect it to. If you do not yet have an account in QuickBooks to Connect with, you can select **Create a new...** as shown below.

After creating a new account, you may need to click **Select an Account** again and select the new account.

6. When done, click **Next** at the bottom.

You will receive a message that you have successfully set up your account.

7. Click **Close** to return to the Downloaded Transactions window.



Questions? Contact our Client Services at 855.343.4070.