Quicken® for Windows

Getting Started Guide for Pacific Premier BusinessSM Online Users





Connect and Update Your Data

Before you set Quicken 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. On the Home page, under **Tools**, select **Add Account**.
- 2. Click the type of account you want to set up. For example, you can choose a Checking account.
- 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 Next.

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.

 After successfully connecting, your Quicken software will prompt you to add your accounts. Follow the prompts to add your account to your Quicken system, then click **Finish**.

Search for your 1 Add your Savings, Checking, Credit	TINANCIAL INSTITUTION Card, Brokerage, and Loan accounts
Pacific Premier	
Other results Pacific Premier Personal Online-WC Pacific Premier Bus Online Web Pacific Premier Business Online DC Pacific Premier Personal Online-DC Pacific Premier Trust	Pacific Premier Business Online DC 714-431-4000 www.ppbi.com



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

- 1. Log into Pacific Premier Business Online through the Pacific Premier Bank website (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 > File Import > Web Connect (.QFX) File.... 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.

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Questions? Contact our Client Services at 855.343.4070.