Quicken® for Windows

PACIFIC PREMIER BANK®

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.

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 **Next**.

   > **NOTE:** You may be asked from the connectivity selection screen to select **Direct Connect** and click **Continue**.
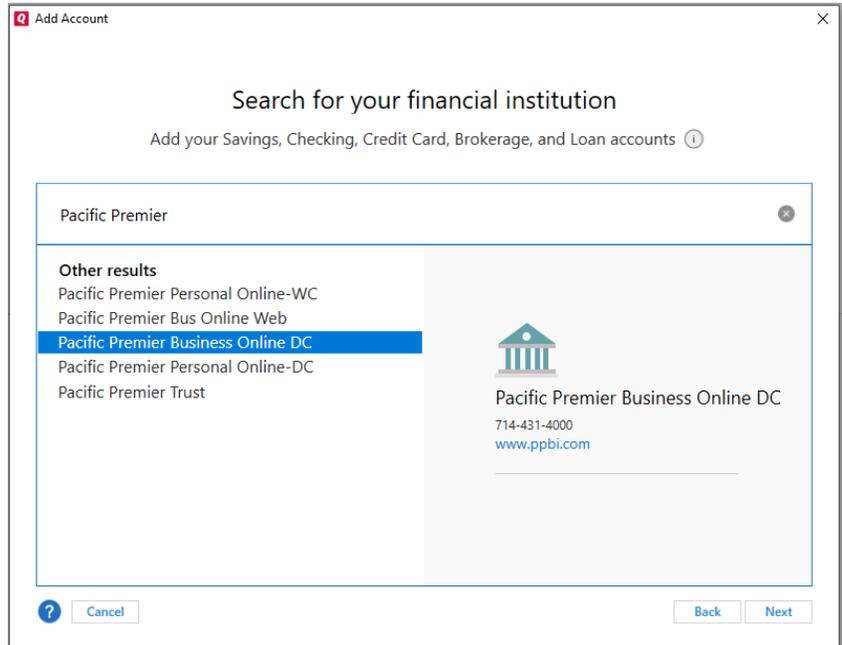
4. Enter your Online Banking Login credentials and click **Connect**.

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

5. 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**.
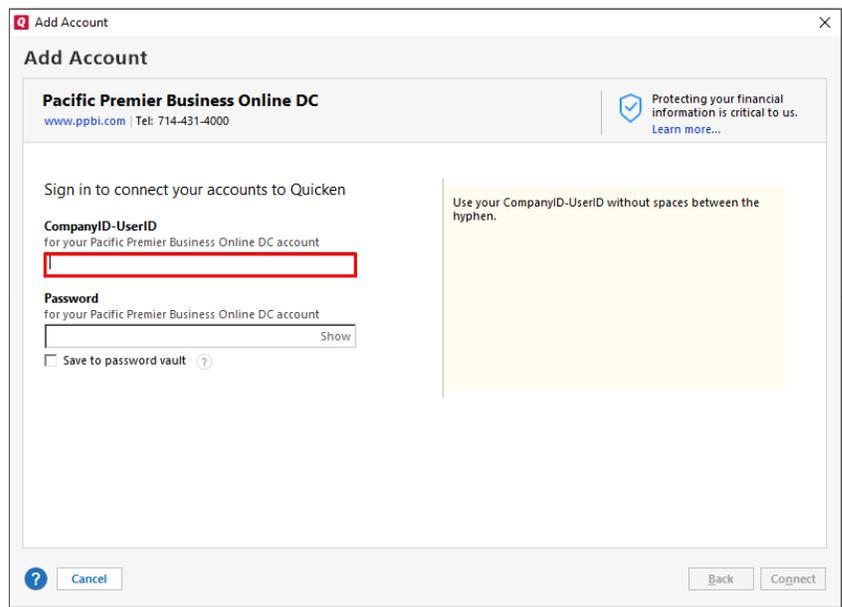
Set Up an Account for Pacific Premier Business Online (Web Connect)

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.
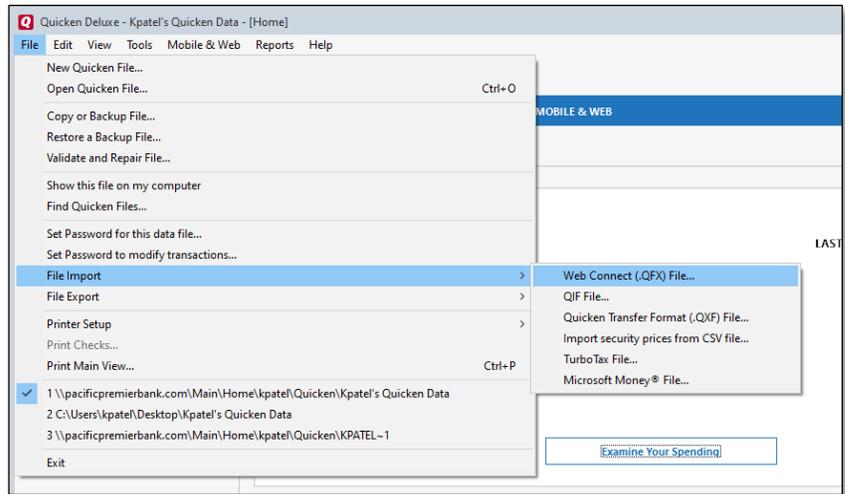
Questions? Contact our Client Services at 855.343.4070.