



PACIFIC PREMIER BANK

Quicken 2016-2018 for Mac Getting Started Guide for Business eBanking Users

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Connect and Update Your Data

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

- Online Banking User Name
- Password

Set Up an Account for Online Banking (Direct Connect)

1. Choose **Tools > 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 Bank – OLB DC** then click **Next**.

Add Checking Account

Enter the name of your financial institution

Pacific Premier

All results

- Pacific Premier Bank
- Pacific Premier Bank - OLB DC
- Pacific Premier BeB Direct**
- Pacific Premier Bank
- Pacific Premier Bank - OLB DC
- Pacific Premier BeB Direct
- Pacific Premier BeB Web Connect

Financial Institution not on the list? Prefer not to download? Interested in advanced
Use [Advanced Setup](#) to create your

Cancel Back Next

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

4. Enter your Online Banking Login credentials and click **Connect**.
*****Within the first box be sure to enter your CompanyID-UserID as shown below.**

The screenshot shows a web form titled "Add Checking Account" for "Pacific Premier BeB Direct". Below the title, it provides the website "pacificpremier.ebanking-services.com" and the telephone number "866-343-4070". The form has two main sections: "CompanyID-UserID" and "Password". The "CompanyID-UserID" section includes a label, a sub-label "for your Pacific Premier BeB Direct account", and a text input field containing "123456-jgibson". The "Password" section includes a label, a sub-label "for your Pacific Premier BeB Direct account", a password input field with asterisks, a "Show" button, and a checkbox labeled "Save this password".

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 Online Banking (Web Connect)

1. Log into your online access through the Pacific Pacific 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>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.