PACIFIC PREMIER BANK

Quicken 2016-2018 for Windows
# 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:

- Business eBanking Company ID and User ID

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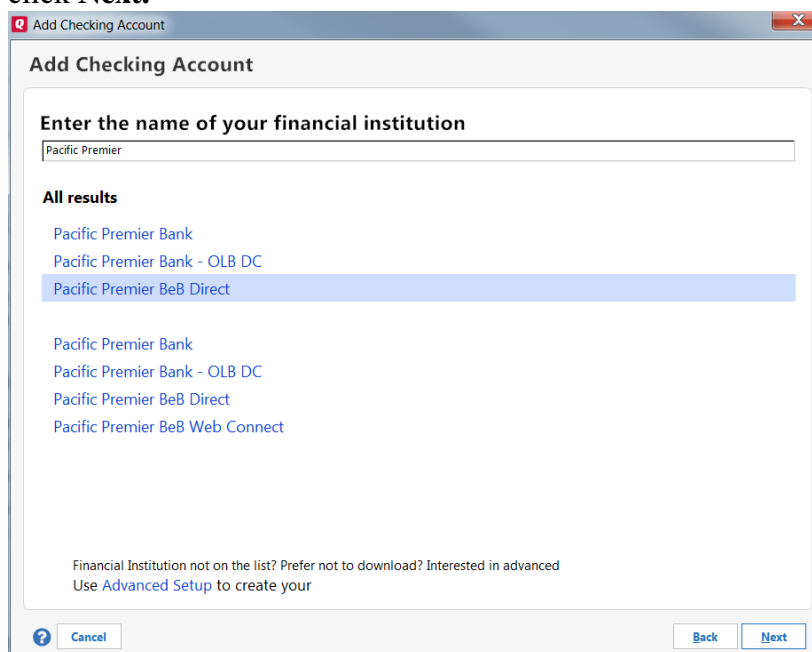
NOTE: You maybe be asked from the connectivity selection screen to select **Direct Connect** and click **Continue.**

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

5. After successfully loging 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.