QuickBooks® for **Windows**

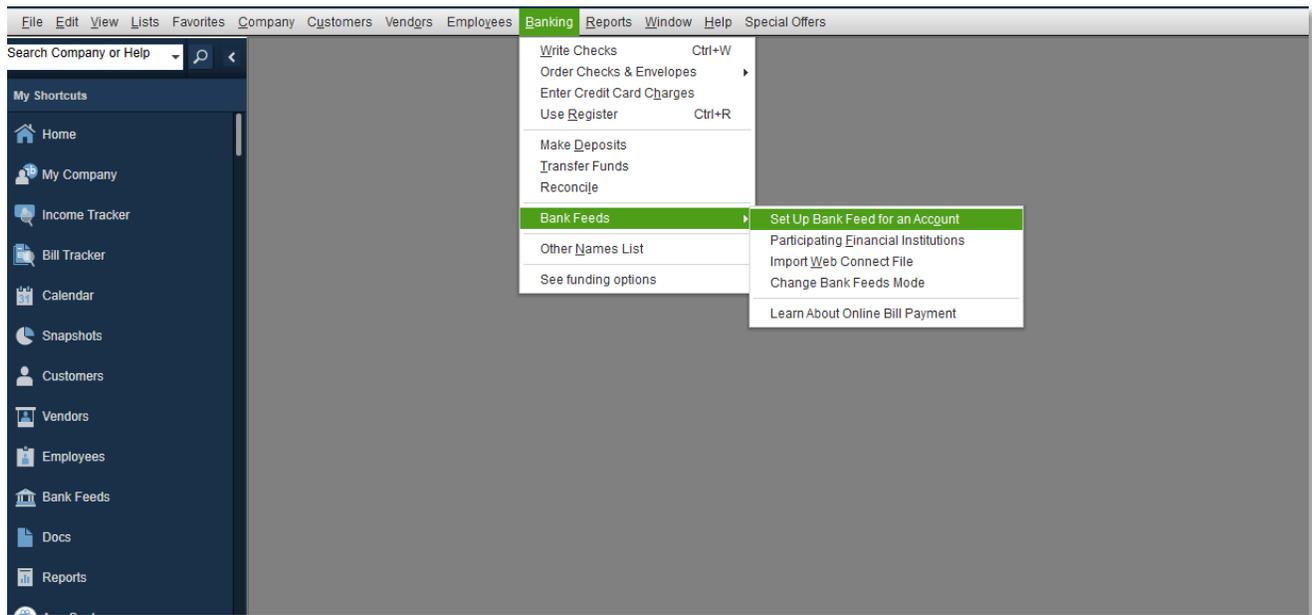**PACIFIC PREMIER BANK**®

Connect and Update Your Data

Before you set QuickBooks to connect your accounts from Pacific Premier Bank, you will need the following information:
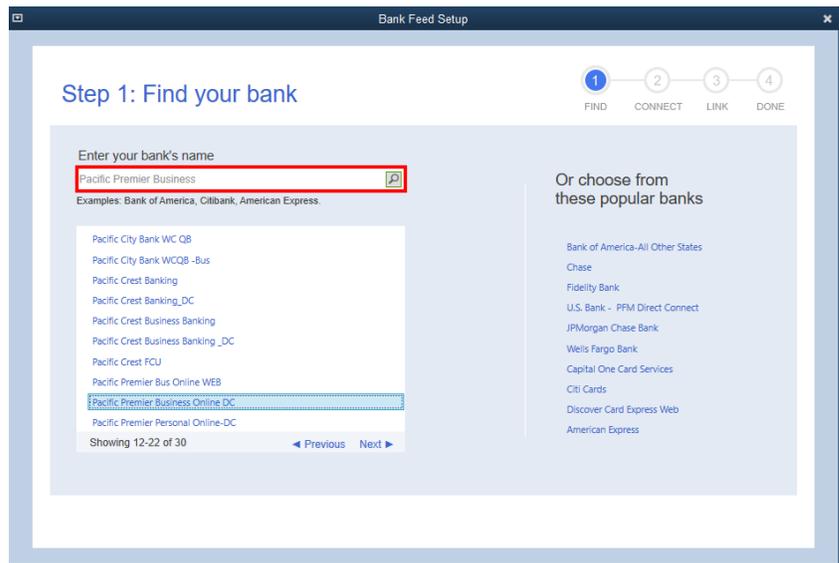
- Pacific Premier Business Online Company ID and Username

- Password

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

1. On the Home page under **Banking**, select **Bank Feeds** and click **Set Up Bank Feed for an Account**.
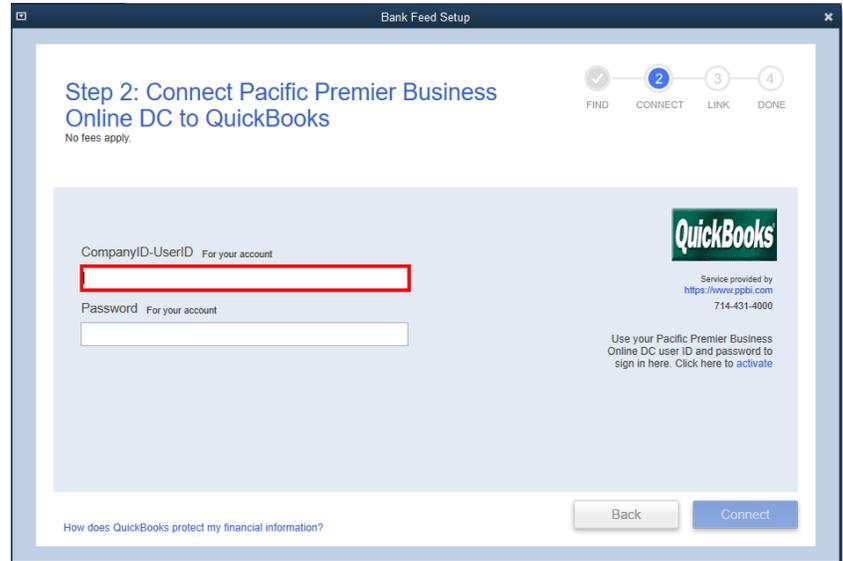
2. On Step 1: Find your bank screen, enter **Pacific Premier Business** and select **Pacific Premier Business Online DC**.
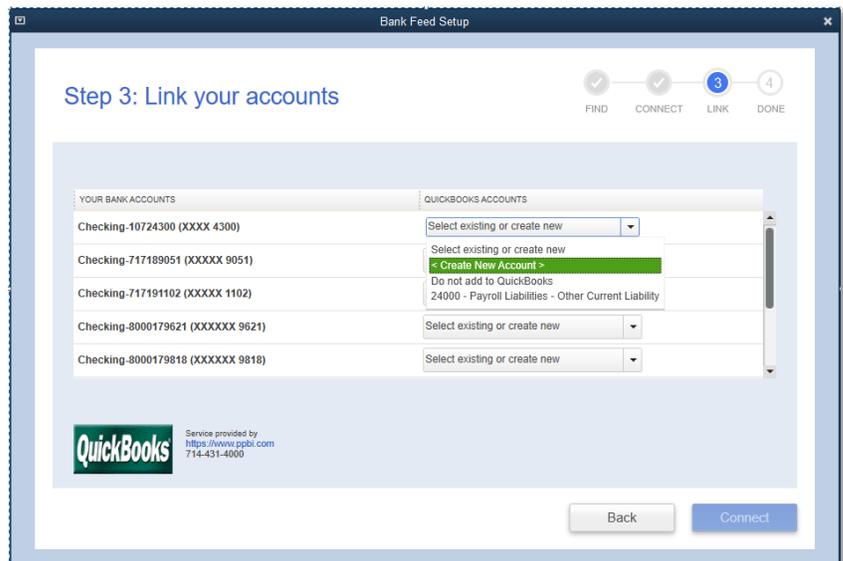
3. Enter your Pacific Premier Business Online login credentials to access your accounts. Click **Connect** when you are finished.

> Be sure to enter your Company ID and User ID together as **Company ID-User ID** in the first box.

4. After you connect, you will see all accounts at Pacific Premier Bank that you can add to QuickBooks. If you don't have an account ready in QuickBooks, click **Create New Account** to create a new account. If you don't want to download data from a particular account, choose **Do not add to QuickBooks** from the drop-down menu.

**5.** After you add your accounts, click **Connect**.

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

1. Log into your online access through the Pacific Premier Bank website (www.ppbi.com).

2. Download account transactions using the **QuickBooks Web Connect (*.QBO)** format, and save the file to your computer.

3. Open QuickBooks and then choose the **Banking** menu > **Bank Feeds** > **Import Web Connect File**.
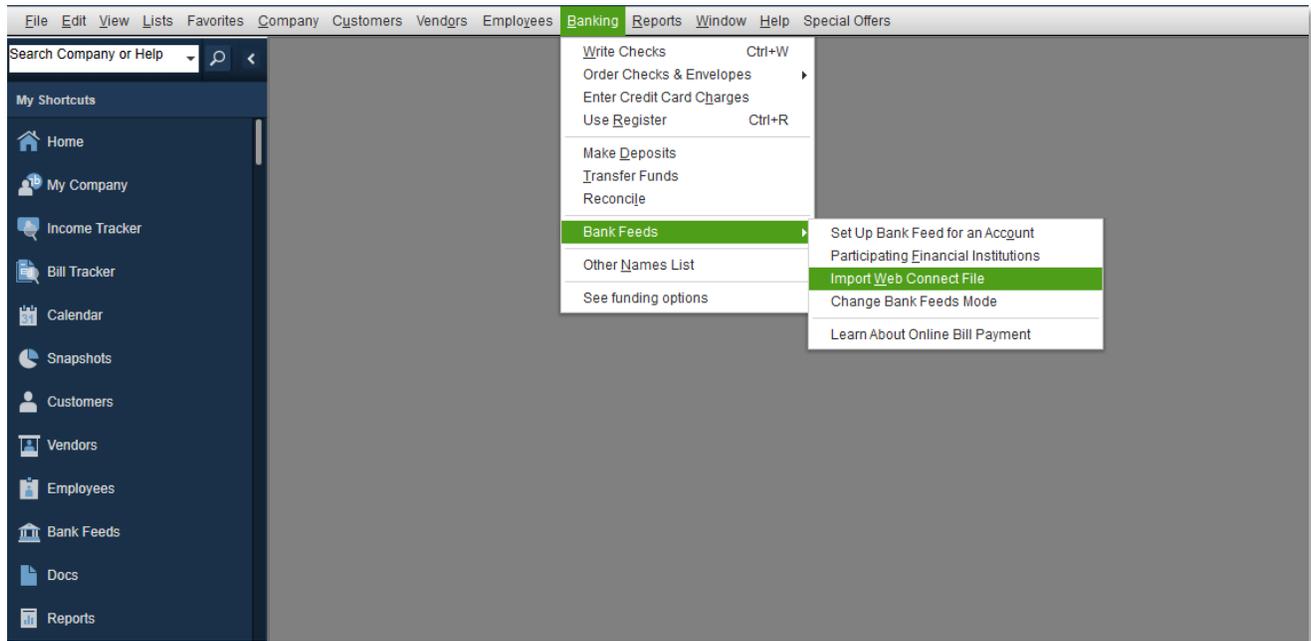
4. You will see an import dialog box.
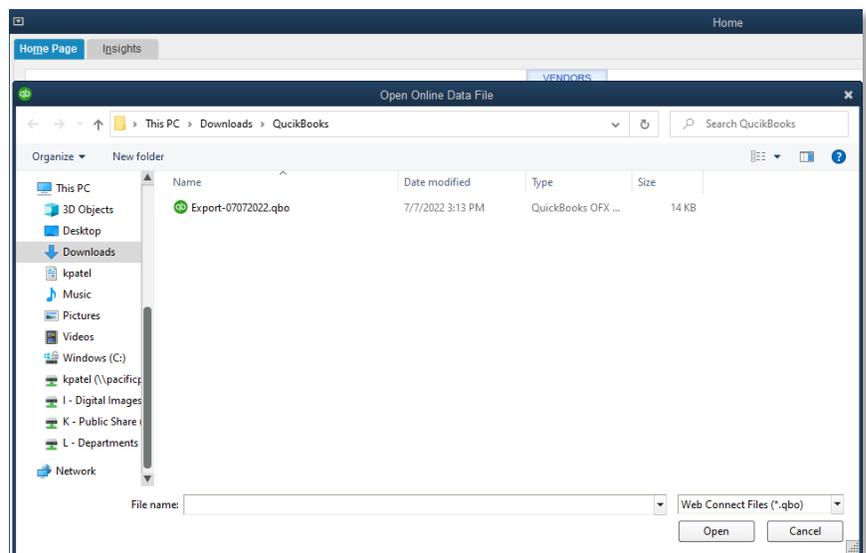
5. Navigate to and select the file you downloaded in Step 2, then click **Open**.

> You will see a dialog box like the one to the right with your Pacific Premier information.

6. Click **Use an existing QuickBooks account** if you have an appropriate account in the Chart of Accounts. If you don't have an account yet, click **Create a new QuickBooks account** and enter a name for that account.

7. Click **Continue**.

8. Click **OK** to confirm and finish.

Questions? Contact our Client Services at 855.343.4070.