

QuickBooks® for Mac

Getting Started Guide for Pacific Premier PersonalSM Online Users



PACIFIC PREMIER BANK®

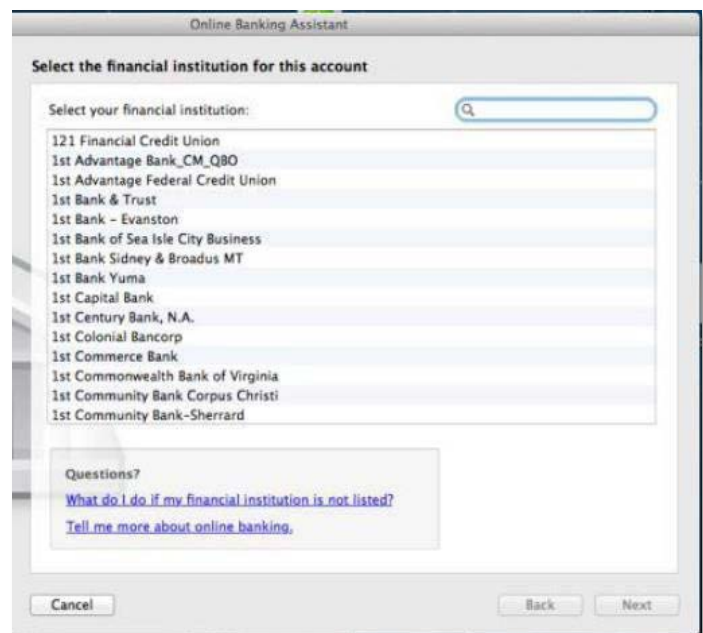
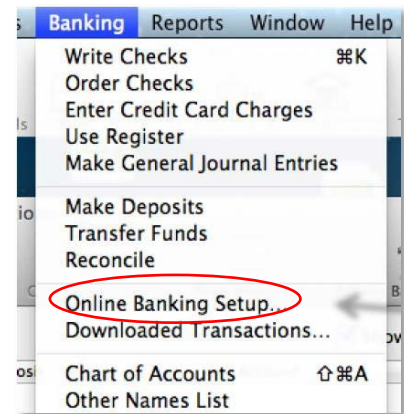
Connect and Update Your Data

Before you set QuickBooks to connect your accounts from Pacific Premier Bank, you will need the following information:

- Pacific Premier Personal Online Username
- Password

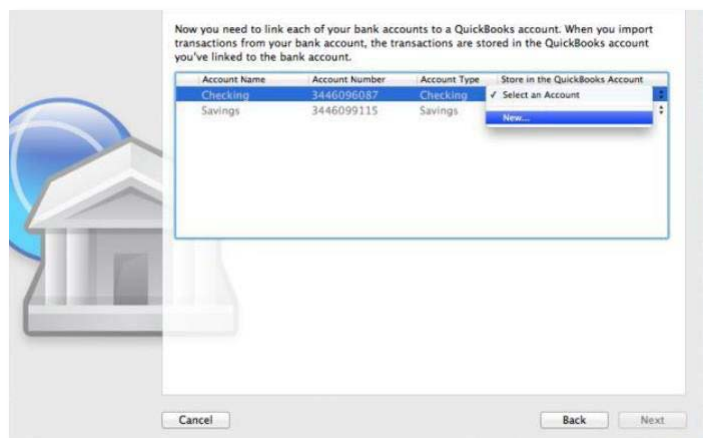
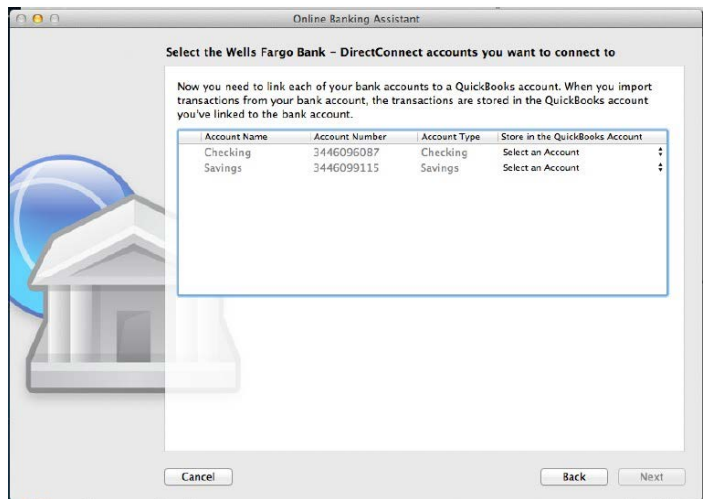
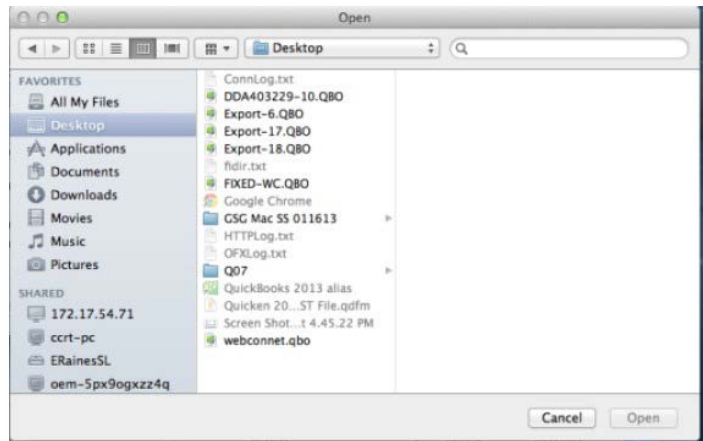
Set Up an Account for Pacific Premier Personal Online (Direct Connect)

1. Go to **Banking**, select **Online Banking Setup**, then **Set Up Account for Online Services**.
2. Click the **Select your QuickBooks account** drop-down arrow, select the QuickBooks account that will connect to your Financial Institution, then click **Next**.
3. Enter **Pacific Premier Business**, select **Pacific Premier Personal Online-DC**, click **Next**.
4. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
5. The Online Banking Assistant window displays during setup. Select **Yes, my account has been activated for QuickBooks online services**, then click **Next**.
6. Enter the Customer ID, Password, and Confirm Password to sign in to your Financial Institution.
7. Click **Sign In**. QuickBooks will connect to the bank's server to download bank data for the selected account.
8. For each account you wish to download into QuickBooks, click **Select an Account** to connect to the appropriate existing account register or create a new account within QuickBooks.
9. Click **Finish** after the download completes. You have successfully activated online banking.



Set Up an Account for Pacific Premier Personal 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 > **Downloaded Transactions** > **Import File**.
4. You will see an import dialog box.
5. Navigate to and select the file you downloaded in Step 1, then click **Open**.
6. You will see a dialog box like the one to the right with your Pacific Premier Bank accounts listed.
7. Click on **Select an Account** for each account and choose which account in QuickBooks to connect it to. If you do not yet have an account in QuickBooks to connect with, you can select **New...** as shown below right.
8. After creating a new account, you may need to click **Select an Account** again and select the new account.
9. When done, click **Next** at the bottom.
10. You will receive a message that you have successfully set up your account.
11. Click **Close** to return to the Downloaded Transactions window.



Questions? Contact our Client Services at 855.343.4070.