

Introduction

As Pacific Premier Bank completes its system conversion, you will need to modify your QuickBooks Online settings to ensure that your data connectivity transfers smoothly to Columbia Bank's system. This document contains instructions for both connectivity types (Express Web Connect and Web Connect).

To navigate this document, just click the link below that matches your product connectivity:

[Instructions for One-Step Update initiated from within QuickBooks Online](#)

[QuickBooks Online Express Web Connect](#) – Page 2

[Instructions for Downloading a Web Connect file from your Online Banking Site](#)

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QuickBooks Online Express Web Connect

Action Date: January 23, 2026 by 4:00 p.m. PT

Ensure you've backed up your data.

Disconnect online banking connection for accounts connected to Pacific Premier Bank.

1. Select **Banking** from the left column.
2. Click the account you want to disconnect, then click the Pencil Icon on the corner of that account box.
3. Click **Edit Account Info**.
4. Check the box next to **Disconnect this Account on Save**.
5. Select **Save and Close**.
6. Repeat steps for any additional accounts that apply.

Action Date: On or after January 26, 2026

1. Reconnect online banking connection for accounts that apply.
 - a. On the Banking page, click **Add Account** in the upper right side of the screen.
 - b. Type Columbia Bank and choose the correct option from the results.
 - c. Enter your Columbia Commercial Online Banking credentials and click **Continue**.
Express Web Connect uses the same credentials you use for your Columbia Commercial Online Banking.
 - d. Provide additional information, if requested.
 - e. Ensure you associate the accounts for Columbia Bank to the appropriate account already listed under *Which accounts do you want to connect?* Choose the matching accounts in the drop-down menu.

Important: Do NOT select "+Add New" unless you intend to add a new account to QuickBooks Online. If you are presented with accounts you do not want to track in this QuickBooks Online Company, Uncheck the box next to the Account Name.

- f. After all accounts have been matched, click **Connect** and then click **Finish**.
2. Exclude Duplicate Transactions.
 - a. Select **Banking** from the left column.
 - b. In the **For Review** section, click the checkboxes for the transactions you want to exclude.
 - c. Choose **Batch Actions > Exclude Selected**.

QuickBooks Online Web Connect

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2. Click the account you want to disconnect, then click the Pencil Icon on the corner of that account box.
3. Click **Edit Account Info**.
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5. Select **Save and Close**.
6. Repeat steps for any additional accounts that apply.

Action Date: On or after January 26, 2026

Reconnect online banking connection for accounts that apply.

1. Download a Web Connect file (.qbo or .qfx) from Columbia Bank's Commercial Online Banking site.
2. In QuickBooks Online, choose **Banking** from the left column.
3. Click **File Upload** in the upper-right side of the screen and use the upload dialog to locate the Web Connect file you downloaded in step a.
4. Choose the appropriate account from the drop-down menu under **QuickBooks Account** and then click **Next**.
Important: Do NOT select "+Add New" in the drop-down menu unless you intend to add a new account to QuickBooks Online.
5. When the import is finished, click **Let's go!**
6. Review the **For Review** tab on the Banking page to view what was downloaded.
7. Click **Next**, and then click **Done**.
8. Repeat this step for each account that you have connected to Columbia Bank.