

## Introduction

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

**IMPORTANT:** As part of the bank transition, Direct Connect will be unavailable for an estimated 5 to 14 business days after January 26, 2026. Please utilize another connectivity type if you need transaction updates during this downtime. There is no delay for Web Connect. Once processing is complete, you will be provided with new Direct Connect login credentials.

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

Instructions for One-Step Update initiated from within Quicken

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Instructions for Downloading a Web Connect file from Columbia's Commercial Online Banking Site

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**Quicken Windows Direct Connect and Express Web Connect**

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

**Back Up Quicken Windows Data File.**

1. Choose **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.

**Deactivate online banking connection for accounts connected to Pacific Premier Bank.**

1. Choose **Tools > Account List**.
2. Click **Edit** on the account to deactivate.
3. In Account Details, click **Online Services**.
4. Click **Deactivate**. Follow prompts to confirm deactivation.
5. Click the **General** tab.
6. Delete Financial Institution and Account Number information. Click **OK** to close window.
7. 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. Choose **Tools > Account List**.
2. Click **Edit** on the account you want to activate.
3. In Account Details, click **Online Services** and then choose **Set up Now**.
4. Type Columbia Bank in the search field and click **Next**.
5. Enter your Columbia Commercial Online Banking login credentials.
  - Express Web Connect uses the same credentials you use for your Columbia Commercial Online Banking login.
  - Direct Connect requires credentials that do not match your Columbia Commercial Online Banking login credentials.

**Important:** If your credentials do not work, contact Columbia Bank.

6. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

**Important:** Do NOT choose "Create a new account" unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore – Don't Download into Quicken** or click **Cancel**.

7. After all accounts have been matched, click **Next** and then click **Done**.

**Quicken Mac Direct Connect and Quicken Connect**

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

**Back Up Quicken Mac Data File.**

1. Choose **File > Save a Backup**.
2. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.

**Action Date:** On or after January 26, 2026

**Activate the online banking connection for accounts connected to Columbia Bank.**

1. Click your account in the **Accounts** list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Columbia Bank in the search field, select the correct option and click **Continue**.
5. Enter your Columbia Commercial Online Banking login credentials.
  - Express Web Connect uses the same credentials you use for your Columbia Commercial Online Banking login.
  - Direct Connect requires credentials that do not match your Columbia Commercial Online Banking login credentials.

**Important:** If your credentials do not work, contact Columbia Bank.

6. In the “Accounts Found” screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account.

**Important:** Do NOT select “ADD” in the Action column unless you intend to add a new account to Quicken.

7. Click **Finish**.

## Quicken Windows Web Connect

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

### **Back Up Quicken Windows Data File.**

1. Choose **File > Backup and Restore > Backup Quicken File.**
2. Download the latest Quicken Update. Go to **Help > Check for Updates.**

### **Deactivate online banking connection for accounts connected to Pacific Premier Bank.**

1. Choose **Tools** menu > **Account List.**
2. Click **Edit** on the account to deactivate.
3. In **Account Details**, click **Online Services.**
4. Click **Deactivate.** Follow prompts to confirm deactivation.
5. Click the **General** tab.
6. Delete Financial Institution and Account Number information.
7. Click **OK** to close window.
8. 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. Log in to Columbia Bank's Commercial Online Banking site and download a Quicken Web Connect file.
2. In Quicken, choose **File > File Import > Web Connect (.QFX) File.**
3. Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
4. Choose **Link to an existing account.** Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
5. Repeat this step for each account you have connected to Columbia Bank.

## Quicken Mac Web Connect

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

### Back Up Quicken Mac Data File.

1. Choose **File > Save a Backup**.
2. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.

**Action Date:** On or after January 26, 2026

### Activate online banking connection for accounts connected to Columbia Bank.

1. Select your account under the **Accounts** list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Columbia Bank in the search field, select the correct option and click **Continue**.
5. Log into Columbia's Commercial Online Banking site and download your transactions to your computer.

**Important:** Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

6. Drag and drop the downloaded file into the box titled **Drop download file**. Choose **Web Connect** for the "Connection Type" if prompted
7. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under the Action column, click **Link** to pick your existing account.

**Important:** Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.

8. Click **Finish**.