Quicken Connect - Personal Software

How to Set Up Online Banking (Quicken Connect)

Step 1: Set Up an Account for Online Banking (Quicken Connect)

- 1. Click Add Account on the sidebar.
- 2. Choose the type of account you want to set up.
- 3. After you select the type the name of account you want to add, you will see the financial institution selection screen. Type the name of your financial institution to filter the list.



- 4. When you see **People's Bank of Commerce -Medford** in the filter results, click it, and click Continue.
- 5. Quicken will now display a login screen: type the credentials you use to log in to your financial institution's website and follow the prompts to add your accounts to Quicken.

NOTE: During the Quicken Connect setup, you might be asked to enter your Multi-Factor Authentication information. This could be a series of security questions, a one-time passcode, etc.

Step 2: Updating Accounts - The One Step Update

After an account has been set up for online banking, you can use update your account data and information very easily. Just click Update Accounts. See diagram on right.

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Need help? Contact your branch of account and we will be happy to assist.

ASHLAND BRANCH 541-665-5262 **BARNETT BRANCH** 541-622-6222

541-776-5350

CENTRAL POINT BRANCH 541-665-5262 **GRANTS PASS BRANCH** 541-955-8005 KLAMATH FALLS BRANCH 541-273-2717





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