

Quicken Web Connect – Activate One Step Update

1. Choose Tools Menu > Account List

Tools	Reports Help	
А	ccount List	Ctrl+A
A	dd Account	

2. Click on Improve connection

Q Acc	ount List			_		×
Acco	ount List					
	Account Name		Transaction Download 📀	Current	t Balance	2
	Spending					
	Checking 🔄	Edit	Yes (Improve connection)		511.	90

3. Enter your Username and Password for online banking then click Connect. If you don't want Quicken to prompt you for your password then click Save this password, otherwise click Connect

Activate One Step Update	
Activate One Step Update	
People's Bank of Commerce WEB: www.peoplesbank.bank TEL: 541-776-5350	
People's Bank of Commerce User ID / User Name for your online People's Bank of Commerce account People's Bank of Commerce password for your online People's Bank of Commerce account Show	Your credentials are safe with Quicken We use bank-level encryption to secure your login credentials, they cannot be compromised We use a read-only connection to your bank. We cannot move or transfer money Learn more about our security
Cancel For more options use Advanced Setup	Co <u>n</u> nec

4. Decide which accounts you want to setup for One Step Update and then click Next

We found the following				Nickname	
Checking XX	Checking	Link	•	Checking	
Checking XX7	Checking	▼ Ignore	~	Checking XX	
Checking XX	Checking	▼ Ignore	•	Checking XX	
Savings XX1	Savings	▼ Ignore	•	Savings XX 🍎	
Savings XX	Savings	▼ Ignore	•	Savings XX	
Savings XX	Savings	▼ Ignore	•	Savings XX 🍋	
Savings XX1	Savings	▼ Ignore	▼	Savings XX	
Savings XX0	Savings	▼ Ignore	_	Savings XX0	

5. Once Quicken sets up the One Step Update for the account(s) click Finish

Account Added People's Bank of Commerce WEB: WWWW.peoplesbank.bank TEL: 541-776-5350 Checking Downloaded and categorized transactions from the last 11 days. □ Sync to Quicken Cloud for Mobile & Alerts The number of days of transactions that Quicken downloads is determined by your financial institution. Most financial institutions provide 90 days of your most recent transactions, but this number can vary based on financial institution policy.	Account Added			
People's Bank of Commerce WEB: www.peoplesbank.bank TEL: 541-776-5350	Account Added			
Checking Downloaded and categorized transactions from the last 11 days. Sync to Quicken Cloud for Mobile & Alerts	People's Bank of Commerce WEB: www.peoplesbank.bank TEL: 541-776-5350			
The number of days of transactions that Quicken downloads is determined by your financial institution. Most financial institutions provide 90 days of your most recent transactions, but this number can vary based on financial institution policv.	Checking Downloaded and categorized transactions from the last 11 days.		Sync to Quicken Cloud for Mobile & Alerts	
	The number of days of transactions that Quicken downloads is determir Most financial institutions provide 90 days of your most recent transacti institution policv.	ed by your fin ons, but this n	ancial institution. umber can vary based on financ	cial

6. You will then see under Transaction Download, Yes (Direct Connect)

Q Ac	count List		- 🗆	×
Acc	count List			
	Account Name	Transaction Download 📀	Current Balan	ice
	Spending			
	Checking 🖳	Edit Yes (Direct Connect)	51	1.90

7. To Update the account moving forward click the refresh arrow next to account



8. If you did not tell Quicken to save the password for online banking you will need to enter it on this screen then click Update Now

Q One Step Update Settings			\times
○ One Step Update Settings			
Download transactions and balances (Show Passwords)			
People's Bank of Commerce	Password		
Online services (all none)			
Download quotes and investment information (select quotes)			
View your investing portfolios online at Investing.Quicken.com (Learn more)		
Schedule Updates	C ^I Up	date Now	Cancel

9. You will get a One Step Update Summary when completed, click Close

Q One Step Update Summary		-		\times
🔿 One Step Update Summary				
🔹 One Step Update Complete				
Financial Institutions Updated				
People's Bank of Commerce 3/12/20 1 account updated, 0 new transactions pm	19 2:48			
Services updated:				
4 quotes and investing headlines updated				
Show just the last update □ Show this window only when there are errors			Close	