

About adding spending accounts

Adding spending accounts to Quicken is easy. Here is some advice, and links to more information to help you get started.

Which spending accounts should I add?

Quicken account	Real-world account
Checking (Tell me how)	Checking Start with your primary checking account. This is the account where you deposit your paycheck and pay your bills from.
Credit Card (Tell me how)	Credit card Start with the card you use most often, and decide how you want to track your credit card in Quicken. Line of credit Use a credit card account to track a line of credit that isn't a home equity line of credit. (Use a Home Equity Line (HELOC) account instead.)
Savings (Tell me how)	Savings Add your savings accounts, especially if they represent a significant part of your net worth or emergency reserves. You can also use this account type to track any CDs (certificates of deposit) or money market accounts that you hold.
Cash (Tell me how)	Cash expenditures or petty cash If you want to know where absolutely all your money goes, or if you need to track petty cash for your business, add a Quicken cash account. (If you do, you can save time by tracking cash expenses only to the nearest dollar.)