


General information

To use Quicken you must start by adding your financial accounts. It's easy to add the accounts you want to track in Quicken. The more accounts you add the more closely Quicken reflects your true financial situation, which can assist you in short- and long-term financial planning.

Add an online account

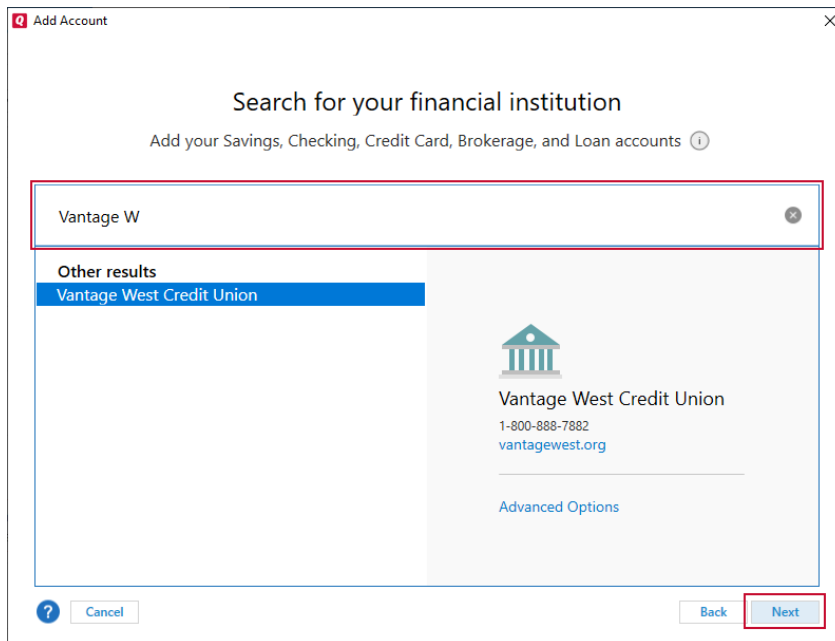
With online accounts, you download your transactions directly from the financial institution. If you do prefer to enter your transactions manually, see **Add an offline spending account** below.


1. Select the **Add Account**  icon on the top right of the **Account Bar**.




You can also add a new account by selecting **Tools Add Account** from the top menu.

2. Start typing the name of your financial institution, **such as your bank or credit card provider**. Quicken will filter the results based on what you type. When you see your financial institution in the panel below, select it and click **Next**.



 For online accounts, Quicken finds accounts based on the financial institution. This way, if you have multiple accounts at the same bank, you can add them all at once. You will have a chance to select the type of account later.

 If you cannot find your financial institution, go to their website or call them to see if they provide instructions for working with Quicken. You can also contact our [customer support](#). While Quicken works with over 14,000 financial institutions, there are some financial institutions that may not be available. In those cases, see our instructions for [adding an offline spending account](#) below.

3. Enter your account/user information. This is the information you use to sign in to your online account, such as a user name and password. you may be asked for additional information, such as a challenge question or a code that is sent to your email or phone.

4. Review your accounts. Quicken will find all the accounts associated with your login. On this screen, you can make any adjustments, then click **Next**.

- **Type:** Your options will vary according to the financial institution but **Checking** and **Savings** are the standard types.
- **Nickname:** Enter any name that helps you easily identify the account.
- **Used for:** Most accounts will be **Personal**, but depending on your versions you may have the option of **Business** and **Rental**.
- **Action:** Select **Add to Quicken** if you want to add an account.

Account	Type	Nickname in Quicken	Used for	Action
REGULAR SHARES	Checking	Joint Checking	Personal	Add to Quicken
VALUFIRST CHECKING	Savings	Joint Savings	Personal	Add to Quicken
Jeni	Checking	Jeni Checking	Business	Add to Quicken
Jen savings	Savings	Jen Savings	Business	Add to Quicken

5. Quicken now adds your accounts. You'll see a message letting you know what accounts were added. You can choose to either **Add Another Account** or **Finish**.

Add an offline account

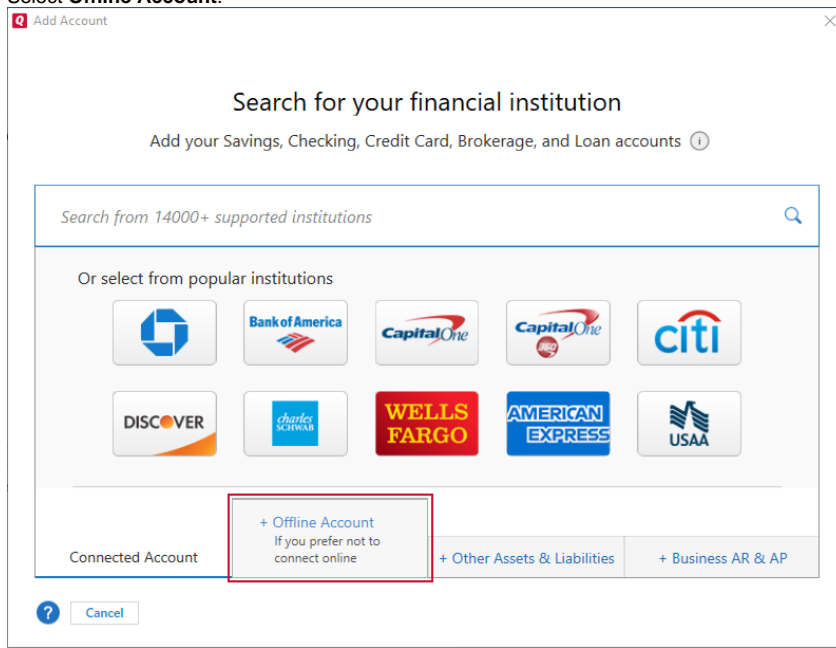
Offline accounts (sometimes called manual accounts) don't connect to a financial institution. It is your responsibility to enter all the information and track your transactions accurately. In most cases, it is preferable to use an online account, but you may choose this for security, control, or because the account is not with an institution Quicken can connect to.

1. Select the **Add Account**  icon on the top right of the **Account Bar**.

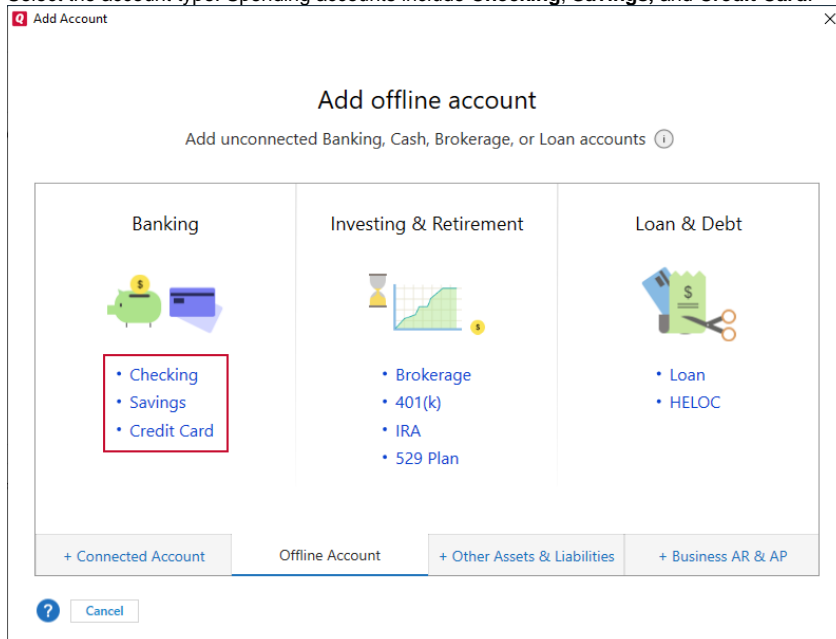


You can also add a new account by selecting **Tools Add Account** from the top menu.

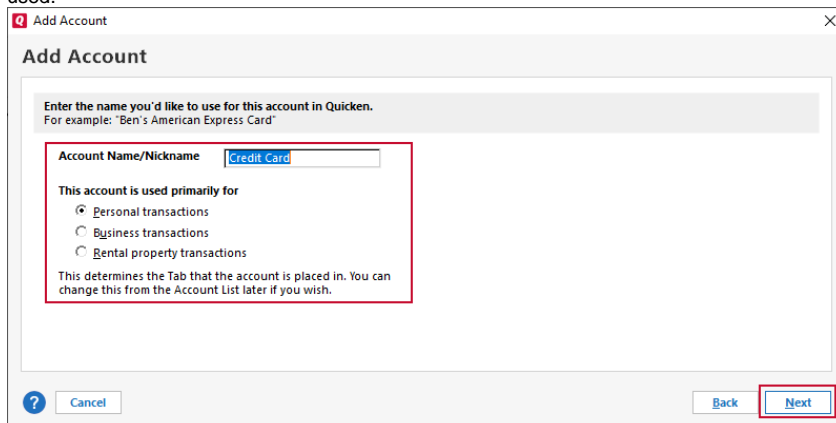
2. Select **Offline Account**.



3. Select the account type. Spending accounts include **Checking, Savings, and Credit Card**.



4. Name your account and select **Next**. Depending on your version of Quicken, you may also have options for selecting how your account is used.



5. Enter your **Statement ending date** (The date you want to start tracking from) and your **Statement ending balance** (how much was in your account that day). Select **Next**.

The screenshot shows a dialog box titled "Add Account" with a close button in the top right corner. The main text reads: "Enter the ending date and balance from your latest statement" and "Don't worry if you don't have your last statement- you can make changes to your account later." Below this, there are two input fields: "Statement ending date" with a calendar icon and "Statement ending balance" with a currency icon. A note next to the balance field says "This becomes the opening balance of your Quicken Account." At the bottom, there are buttons for "?", "Cancel", "Back", and "Next".

6. Your account will be added. Select **Finish**.

Add other account types

When you set up a loan, Quicken creates a loan account that tracks the amount you owe, the length of the loan, the current interest rate, and your chosen method of payment. After it's set up, click the loan name in the Account Bar to use the Quicken loan feature. It provides some great tools for managing your loans and figuring out where you stand.

1. Click the **Add Account** plus sign icon  at the top right of the **Account Bar**.
2. During the setup process, you'll be asked a few questions:

If your bank or brokerage is listed on the screen, click it.

If your bank or brokerage is not listed on the screen, start typing its name. After you type a few characters Quicken displays a list of possible matches. If you see what you are looking for, go ahead and click the name of your bank or brokerage. If you don't see what you are looking for, click Back and try again.

What if I can't find it in the list, or I want to enter transactions manually?

Use [Manual Loan Account Setup](#).

Why does Quicken want to know my bank name?

Quicken needs to know your bank or brokerage name to find out if it can download transactions for you.

Downloading transactions will:

- Save you from manually entering your data
- Ensure data accuracy
- Help you detect invalid or fraudulent transactions

What if I don't enter the name of my bank? (Keep the info that's already here?)

If you don't enter the name of your bank or brokerage, Quicken won't be able to download transactions for you. You will therefore have to manually enter your transactions into Quicken. See [Manual Loan Account Setup](#).

3. Select a currency for the account (**Optional**)
If you have set up Quicken to track multiple [currencies](#), select one from the list. If you decide you need to change the currency for the account, you can do so only if you haven't entered any transactions except the opening balance.
4. What is your financial institution User ID and password?

Quicken needs this information so it can download your account information. For most banks and brokerages, you can use the same user ID and password you use to log in to their website. If you don't have a user ID and password right now, add the account manually. You can always activate it to update transactions or send payments later on.

- **What is a user name?**

It may be an account number or some other number assigned by your bank or brokerage. It may also be the user ID you use to log in to their website.

- **Can I use the password for my bank website?**

Yes. If you entered the user ID that you use to log in to your bank or brokerage website in the user ID field, then enter the website password as well.

- **Did you receive "Direct Connect" instructions from your bank or brokerage?**

Direct Connect is a service some banks and brokerages use to connect to Quicken. You will know if you have **Direct Connect** if you specifically signed up for it and/or your bank or brokerage sent you a special user ID and password to use with Quicken. If so, use your Direct Connect login information on this screen.

If you did not receive special login instructions, use your website user ID and password here.

If you are not sure what to do, use the user ID and password you would use to log in to your bank's website.

- **Can I see my password while entering the user ID and password?**

Yes. To see the password while adding an account, select the **Show Characters** box to the right of the password box.

- **What happens if I save my password?**

This step is necessary only for accounts using direct connect. See [Why don't I need to enter my bank password to download from my bank? \(support site\)](#) for more information.

Quicken's **Password Vault** is a secure and convenient way to store multiple financial institution passwords that you can then access with a single master password.

- You can open the **Password Vault** to add, remove, or change stored passwords at any time.
- When the **Password Vault** was developed, it went through a rigorous security review.
- The **Password Vault** uses industry-standard encryption to save your passwords, and it is careful to remove them from memory when they are no longer being used.

5. Tips for successful connections

Sometimes Quicken needs more information to determine what type of account you have, or at what branch the account resides at before it can access it. If you are not sure, here are some tips that may help you:

Account Type

If different types of accounts are shown, such as checking, savings, or credit card, choose the account type that applies to you.

State or Location

Some banks and brokerages use a state or region to classify accounts. If you see your state listed, this is probably the option to select.

Bank Mergers

Did your local bank or credit union merge with a larger bank? If you see your old or pre-merger bank name listed, this is probably the option to select.

Having trouble? Contact your bank or brokerage for instructions.

6. How should Quicken set up accounts it has found?

We have found the following

This is a list of your accounts that Quicken has detected at your bank or brokerage.

Add, Ignore, or Link

- Quicken needs to know what you want to do with the accounts it has found. Keep in mind that you don't need to set up all of the accounts it finds; just the ones that you want to track in Quicken.
- Choose **Add** to create a new Quicken account in which to download your transactions. If you are new to Quicken, this is probably the option that you want.
- Choose **Link** to download your transactions into an existing Quicken account. If you have previously set up the account in Quicken, but are not yet downloading transactions into it, this is probably the option you want.
- Choose **Ignore** to disregard one of the accounts that Quicken has found. No account will be created, and transactions for that account will not be downloaded into Quicken.

Nickname (Optional)

Enter the name you want to use to refer to the account in Quicken. This name will appear in reports, and in the Quicken interface. If you don't enter a nickname, Quicken will use the name provided by your financial institution for the account.

Used mostly for

If you are using Quicken Home, Business & Rental Property, choose the primary use of the account: Personal (which is the default), Business, or Rental Property. Your selection determines where in the Quicken interface (on which tab) the account appears. You can change this from the Account List later if you wish.

- **Your accounts have been added!**

You will receive confirmation that your account, or accounts, have been added to Quicken. Depending on the type of account you are adding there may be other steps you need to take. This screen will tell you what you need to do, if anything, to start using the accounts. Congratulations!

If you have chosen to use mobile as a part of your Quicken Registration, on this screen, you will get an option to sync the added account to the cloud. If you wish to add this account to the cloud, select the Sync to Quicken cloud for Mobile / Alerts check-box next to the account that you have added.

- **Why do I not see the option to Sync to Quicken Cloud?**

You will see this option only if you have chosen to Use Mobile as part of the registration. If you wish to view your accounts in mobile or to receive custom account notifications, click the Mobile and Web tab and follow the instructions.

7. Your accounts have been added

Why don't I see the option to Sync to Quicken Cloud?

You will see this option only if you have chosen to Use Mobile as part of the registration. If you wish to view your accounts in mobile or to receive custom account notifications, click the Mobile and Web tab and follow the instructions.

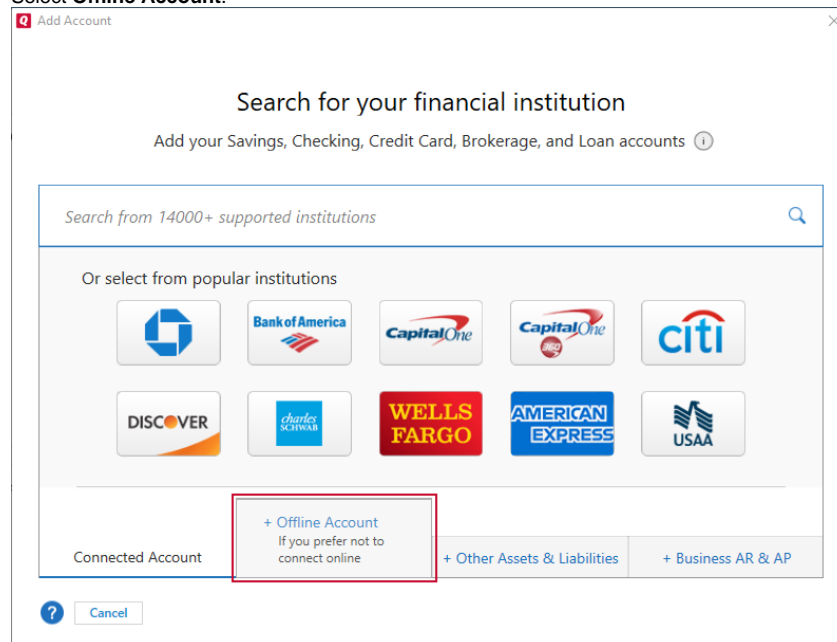
If you'd prefer to add a "disconnected" or manual loan account:

1. Select the **Add Account**  icon on the top right of the **Account Bar**.

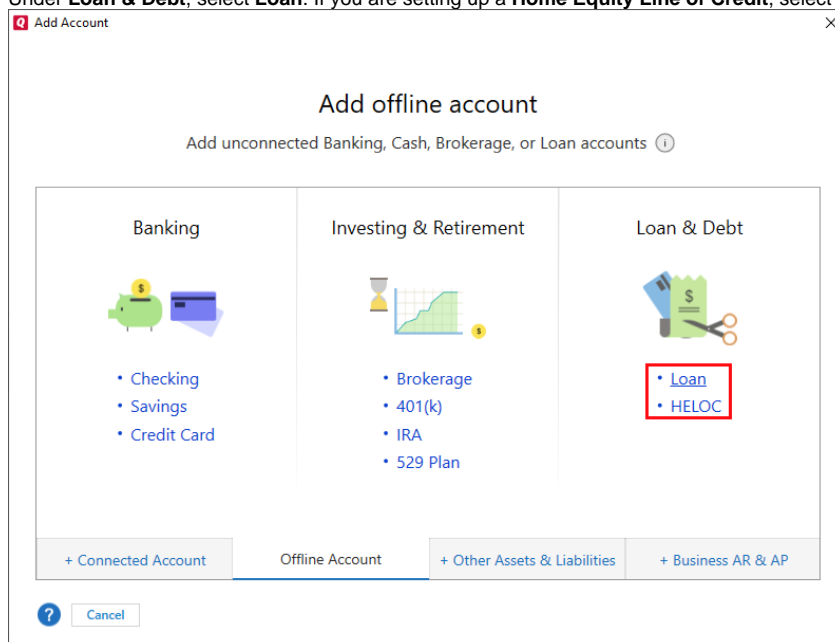


You can also add a new account by selecting **Tools Add Account** from the top menu.

2. Select **Offline Account**.



3. Under **Loan & Debt**, select **Loan**. If you are setting up a **Home Equity Line of Credit**, select **HELOC**.



4. Enter your loan information. (See loan information details below)
5. Select **Next**. Answer any additional questions.
6. Review the **Loan Payment Reminder**.
7. Select **Done**.

Loan Information Details

Enter the name you want to use to refer to the account in Quicken. This name will appear in reports, and in the Quicken interface.

Select the type of loan you want to set up. Your selection determines the categories Quicken creates to track your loan. For example, to track a mortgage Quicken creates **Home:Mortgage:Principal**; and to track an auto loan Quicken creates **Auto&Transport:Auto Payment:Principal**. For "connected" loan accounts, this option may not be available because the loan type is determined by your financial institution.

If your loan is:

- For a new bank loan, enter the loan amount in **Original Balance**. Quicken inserts today's date in **Opening Date**, but you can change it.
- For an existing bank loan, enter the original balance of the loan in Original Balance, and enter the date on which you first took out the loan in Opening Date.

Current interest rate

- Enter the interest rate that will be in effect for the next payment.
- If the loan is an adjustable-rate loan, you can [change the rate when necessary](#).
- You don't have to enter the percent sign.

The **Original Length** of the loan refers to the period of time during which payments are due, starting from the date the loan was opened until the date the last payment is due.

Tell Quicken how often your loan is compounded. Select **Daily**, **Monthly**, or **Semi-Annually** from the drop-down list.

The **Compounding Period** affects how much interest is owed on a loan. The more frequently the interest is calculated, the higher the total interest is.

Tell Quicken how often you make payments. Select the period that matches your loan from the drop-down list.

Enter the amount due on the loan, as of the opening date you entered above. For "connected" loan accounts, you may not be able to change the current balance because it is downloaded from your financial institution.

Enter the base amount of your loan payment. Include your regular payment only (principal + interest). Don't include any fees other amounts. If this is an interest-only loan, enter it as the payment amount.

Enter the date by which your lender must receive payment.

Enter any additional fees that you are required to pay on top of your base loan payment.

Enter any additional money you want to pay towards reducing your loan principal.

If you are adding a "connected" loan account, you may set up a simple or a detailed loan reminder. If you are adding a "disconnected" manual loan account, you may set up a detailed loan reminder only.

A simple loan reminder tracks only the loan payment total.

A detailed loan reminder tracks all of the line items included in your loan payment total –things like interest, private mortgage insurance, and property taxes. Tracking these items can help you plan and project your spending and taxes. To learn more, see [Set up a detailed loan payment reminder](#).

Quicken asks if you'd like to set up an asset account to track the value of the item you're purchasing with this loan. This makes net worth reports more accurate.

1. If you'd like to set up an account, click **Add linked asset account** and select the type of asset account to create. If you don't want an asset account, click **Done**.
2. Quicken displays your loan in the **Property & Debt** tab.

When you add an account, Quicken adds the new account to the Account List (choose Tools menu > Account List). In most cases, you'll want to add all your accounts in the same Quicken data file, so that you can track all your finances in one place.

1. Select the **Add Account**  icon on the top right of the **Account Bar**.



2. You can also add a new account by selecting **Tools Add Account** from the top menu.
2. Enter the name of your brokerage and select.
3. Follow the on-screen instructions.

Simple Setup wizard

As you move through the account setup process, you may not see all the pages described below—these depend on the type of account you are adding and how much information Quicken can download from your financial institution. Expand a section below for more information.

Simple Investing tracks positions only

With Simple Investing, Quicken keeps track of the positions (number of shares for each security) over time, and your cash balances. Quicken's tracking is based on information provided by your broker. Your portfolio value, net worth, and investment returns over time will be available, but Quicken will not be able to calculate capital gains and losses or investment income. Quicken will display an account summary rather than an investment transaction register when the account is selected.

Complete Investing tracks positions and transactions

With Complete Investing, Quicken keeps track of transaction detail as well as the positions over time, based on information provided by your broker. This is the tracking approach that Quicken has always provided in the past. With Complete Investing, in addition to portfolio value, net worth, and investment returns, Quicken is able to track and displays capital gains, and capital losses, and investment income. Quicken will display the investment transaction register when the account is selected.

Select the type of account you would like to add to Quicken.

If your bank or brokerage is listed on the screen, click it.

If your bank or brokerage is not listed on the screen, start typing its name. After you type a few characters Quicken displays a list of possible matches. If you see what you are looking for, go ahead and click the name of your bank or brokerage. If you don't see what you are looking for, click Back and try again.

If you've tried a couple of times and you can't find your bank or brokerage in the list, or if you want to enter your transactions manually, click **Advanced Setup** and then choose **I want to enter my transactions manually**. You can always activate it to download transactions or send payments later on (if your financial institution supports bill pay).

Quicken needs to know your bank or brokerage name to find out if it can download transactions for you.

Downloading transactions will:

- Save you from manually entering your data
- Ensure data accuracy
- Help you detect invalid or fraudulent transactions

If you don't enter the name of your bank or brokerage, Quicken won't be able to download transactions for you. You will therefore have to manually enter your transactions into Quicken.

If you have set up Quicken to track multiple **currencies**, select one from the list. If you decide you need to change the currency for the account, you can do so only if you haven't entered any transactions except the opening balance.

Quicken needs this information so it can download your account information. For most banks and brokerages, you can use the same user ID and password you use to log in to their website. If you don't have a user ID and password right now, add the account manually. You can always activate it to update transactions or send payments later on.

It may be an account number or some other number assigned by your bank or brokerage. It may also be the user ID you use to log in to their website.

Yes. If you entered the user ID that you use to log in to your bank or brokerage website in the user ID field, then enter the website password as well.

Direct Connect is a service some banks and brokerages use to connect to Quicken. You will know if you have Direct Connect if you specifically signed up for it and/or your bank or brokerage sent you a special user ID and password to use with Quicken. If so, use your Direct Connect login information on this screen.

If you did not receive special login instructions, use your website user ID and password here.

If you are not sure what to do, use the user ID and password you would use to log in to your bank's website.

Yes. To see the password while adding an account, select the Show Characters box to the right of the password box.

Your password will be saved in the Quicken Password Vault.

Quicken's Password Vault is a secure and convenient way to store multiple financial institution passwords that you can then access with a single master password.

- You can open the Password Vault to add, remove, or change stored passwords at any time.
- When the Password Vault was developed, it went through a rigorous security review.
- The Password Vault uses industry-standard encryption to save your passwords, and it is careful to remove them from memory when they are no longer being used.

Sometimes Quicken needs more information to determine what type of account you have, or at what branch the account resides at before it can access it. If you are not sure, here are some tips that may help you:

Account Type

If different types of accounts are shown, such as checking, savings, or credit card, choose the account type that applies to you.

State or Location

Some banks and brokerages use a state or region to classify accounts. If you see your state listed, this is probably the option to select.

Bank Mergers

Did your local bank or credit union merge with a larger bank? If you see your old or pre-merger bank name listed, this is probably the option to select.

Having trouble? Contact your bank or brokerage for instructions.

After you tell Quicken how to access your bank or brokerage, it goes online and downloads information about the accounts you hold there. Quicken then asks you to provide a bit more information about the accounts.

We have found the following

This is a list of your accounts that Quicken has detected at your bank or brokerage.

Account Type

You may see various items in this list: Checking, Savings, Credit Card, Brokerage, IRA or Keogh plan, or 401(k). Choose one that best matches the purpose of your real-world account.

Add, Ignore, or Link

Quicken needs to know what you want to do with the accounts it has found. Keep in mind that you don't need to set up all of the accounts it finds; just the ones that you want to track in Quicken.

Choose Add to create a new Quicken account in which to download your transactions. If you are new to Quicken, this is probably the option that you want.

Choose Link to download your transactions into an existing Quicken account. If you have previously set up the account in Quicken, but are not yet downloading transactions into it, this is probably the option you want.

Choose Ignore to disregard one of the accounts that Quicken has found. No account will be created, and transactions for that account will not be downloaded into Quicken.

Nickname (Optional)

Enter the name you want to use to refer to the account in Quicken. This name will appear in reports, and in the Quicken interface. If you don't enter a nickname, Quicken will use the name provided by your financial institution for the account.

Used mostly for

If you are using Quicken Home, Business & Rental Property, choose the primary use of the account: Personal (which is the default), Business, or Rental Property. Your selection determines where in the Quicken interface (on which tab) the account appears. You can change this from the Account List later if you wish. the account appears. You can change this from the Account List later if you wish.

You will receive confirmation that your account, or accounts, have been added to Quicken. Depending on the type of account you are adding there may be other steps you need to take. This screen will tell you what you need to do, if anything, to start using the accounts. Congratulations!

If you have chosen to use mobile as a part of your Quicken Registration, on this screen, you will get an option to sync the added account to the cloud. If you wish to add this account to the cloud, select the Sync to Quicken cloud for Mobile / Alerts check-box next to the account that you have added.

You will see this option only if you have chosen to Use Mobile as part of the registration. If you wish to view your accounts in mobile or to receive custom account notifications, click the Mobile and Web tab and follow the instructions.

Advanced Setup wizard

For most users, Simple Setup is all they will need to add their accounts. If you need to use Advanced/Manual Setup you will see a few additional screens. Click a link for more information.

If you want to download transactions into Quicken, enter the name of your bank, brokerage, or credit card company and click Next.

If you don't want to download transactions into Quicken, select I want to enter my transactions manually and click Next. This option means that you will need to update your account transactions by hand.

Enter the name you want to use to refer to the account in Quicken. This name will appear in reports, and in the Quicken interface.

If you are using Quicken Home, Business & Rental Property, choose the primary use of the account: Personal (which is the default), Business, or Rental Property. Your selection determines where in the Quicken interface (on which tab) the account appears. You can change this from the Account List later if you wish. the account appears. You can change this from the Account List later if you wish.

If you know the ending date and balance

Enter the appropriate date and balance from your statement, and then click Done.

If you don't know the ending date and balance

Leave the settings as they are (today's date, with a zero balance), and then click Done.

The new account will be added with an opening balance of \$0.00, as of today. You can [edit the opening balance](#) later.

The following options are not available for every account. The connection methods you see in the wizard will be customized to your financial institution and the account you are setting up.

Express Web Connect (Free)

Express Web Connect provides an integrated way to update transactions and account balances for financial institutions that do not currently connect directly to Quicken. With Express Web Connect, you can use One Step Update to update multiple accounts, and you no longer have to go to a financial institution's website to retrieve transactions.

Direct Connect (Fees may apply)

Direct Connect is a service some banks use to connect to Quicken. You will know if you have Direct Connect if you specifically signed up for it and/or your bank sent you a special user ID and password to use with Quicken. Some financial institutions require Direct Connect to use services such as bill pay, or transfers via Quicken.

Web Connect (Free)

Many financial institutions offering Web banking also let you download your Web transactions into Quicken. If you already have a password, and if the website displays the Quicken logo or a button or link that says Download to Quicken, this means that your financial institution supports the Web Connect protocol for downloading and importing transactions into Quicken.

1. Next to Who owns this IRA? select either yourself or your spouse.

2. Next to IRA Type select:

- Traditional IRA
- Roth IRA
- Coverdell ESA
- Keogh plan
- SEP IRA
- SIMPLE IRA

1. Enter a name for this account.

Account names usually appear in alphabetical order in Quicken. If you and your spouse both have a 401(k) account, or you have 401(k) accounts from previous employers, begin each account name with something similar, such as "401(k) for Terry" and "401(k) for Chris." This way, all your 401(k) accounts will appear next to each other in lists throughout Quicken.

2. Enter the ending date from your statement.

Caution

If you're entering information from your financial institution's website instead of from a paper statement, and if this date is today's date, then don't download transactions for this account until tomorrow. This is necessary to reconcile your Quicken account data with account data posted by your financial institution.

3. Enter the name of your employer and whether this is your current employer or a previous one.
4. Identify the owner of this account: you or your spouse.
Quicken uses this to assign the correct tax-related category to transactions.

1. In the Statement Date field, enter one of the following:
 - If you're entering this information from a statement, enter the statement ending date.
 - If you're entering this information from your financial institution's website, use the date the information was posted (usually today or yesterday).
2. In the Cash field, enter the cash balance in this account.
If your broker sweeps your cash balance into a money market fund, then the amount that is actually held in cash may be a very small amount—usually only equal to the amount of a recent dividend, security sale, or other transaction that resulted in a positive cash amount.
3. In the Money Market Fund field, enter the share balance for your money market fund security, if any.
Your broker may call this a sweep fund. The cash balance and the sweep fund together make up your total cash balance. For example, if you have \$200 in cash and \$1,200 in shares of a money market fund, your total cash balance would be \$1,400.

Do the following for each security you hold in this account:

1. In the Ticker field, enter the ticker symbol for the security. If you know the security ticker, Quicken will download the name for you.
 - If you don't know the ticker symbol, click Ticker Symbol Lookup.
 - If the security doesn't have a ticker symbol (for example, a proprietary security sold by your financial institution), enter a security name in the Security Name field.
 - Don't enter bonds on this page. When you're finished setting up securities, open the transaction list, click Enter Transaction, and then choose Bond Purchase.
2. When you've finished for each security, click Next.

Do the following for each security you hold in this account:

1. Enter the number of shares for each security you own. If this is a 401(k) account only, enter the number of shares and total market value. (If your financial institution doesn't report the number of shares, you can enter the market value.)
2. Select the appropriate security type: Stock, Mutual Fund, or Other.
3. Click Next.

Review the information you entered on the previous pages. If you need to change anything, click Back.

- [Note for IRA accounts](#)

If this is an IRA account, Quicken identifies the entire opening balance as a contribution in the year that the account is added. If you want to edit the opening balance to assign contribution amounts to specific prior tax years, you can do so now:

1. Scroll down to the blank transaction line at the bottom of the transaction list.
2. Click Enter Transaction.
3. In the Enter transactions field, select Cash Transferred into Account. Follow the on-screen instructions to create a cash transfer into the account for a prior tax year. Be sure to use the correct date for both the transaction and for the tax year assignment.
4. Click Enter New if you need to repeat step 3 for prior tax years. When you're finished, click Enter Done.
5. Go back to the top of the transaction list and [change the Opening Balance](#) to equal just the amount you actually contributed this year.

Additional Information

- [Decide whether to enter historical transactions.](#)
- [Special investment account types.](#)

When you add a new account, Quicken adds it to the Account List (choose **Tools** menu > **Account List**). In most cases, you'll want to add all of your household's accounts in the same [Quicken data file](#), so that you can track all your finances in one place.

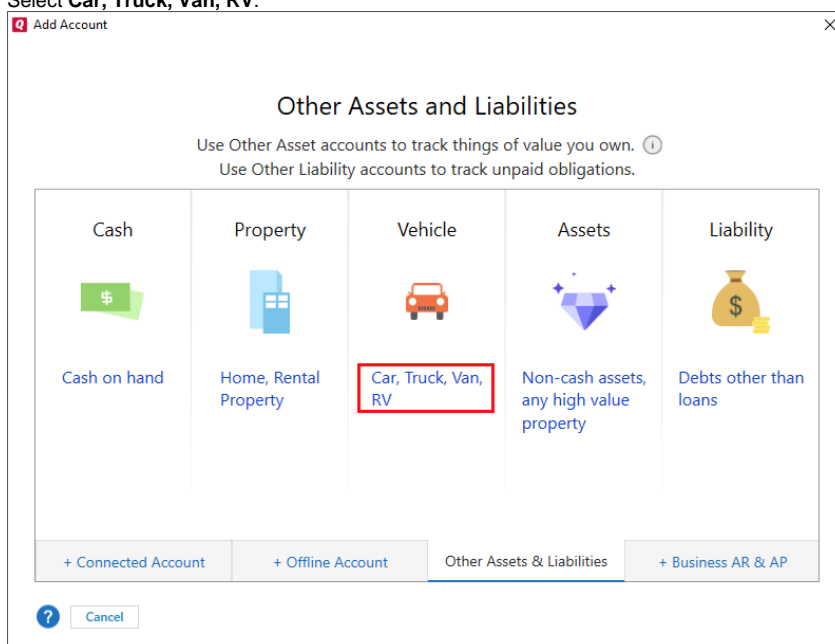
1. Select the **Add Account**  icon on the top right of the [Account Bar](#).



You can also add a new account by selecting **Tools** **Add Account** from the top menu.

2. Click **Other Assets & Liabilities**.

3. Select **Car, Truck, Van, RV**.




4. During the setup process, you'll be asked a few questions.

- **What is the name you'd like to use for this account?**
 - Enter the name you want to use to refer to the account in Quicken. This name will appear in reports, and in the Quicken interface.
- **What is this account primarily used for?**
 - If you are using Quicken Home, Business & Rental Property, choose the primary use of the account: Personal (which is the default), Business, or Rental Property. Your selection determines where in the Quicken interface (on which tab) the account appears. You can change this from the Account List later if you wish.
- **Select a currency for the account (Optional)**
 - If you have set up Quicken to track multiple [currencies](#), select one from the list. If you decide you need to change the currency for the account, you can do so only if you haven't entered any transactions except the opening balance.
- **Tell Quicken about the vehicle you'd like to track**
 - Enter the vehicle make/manufacturer, model, and year.
 - Enter the purchase date and price of your vehicle.
 - **What if you don't know the purchase price?**
 - If you don't remember, enter zero. The new account will be added with an opening balance of \$0.00, as of today. You can edit this amount later.
 - Enter the estimated value of your vehicle. Doing so will let you track your equity in the vehicle.
- **Is there a loan on this vehicle?**
 - If you have a loan, click **Yes** and choose one of the following options:
 - **I'd like to track this loan in Quicken. Set up a new account for this.** Quicken walks you through the steps to add a loan to track the payment schedule, principal, and interest, and a liability account to track your loan balance, which is used in your Net Worth report. For more information, see [Set up a loan or mortgage](#).
 - **I'm already tracking the loan in Quicken.** Select existing account. In the drop-down list, select the appropriate loan account.
 - **I do not want to track the loan in Quicken.**

If you make a lot of reimbursable work-related expenses, you can track them in a Quicken cash account.

To add an account:

1. Select the **Add Account**  icon on the top right of the **Account Bar**.
2. Select **Other Assets and Liabilities**.
3. Select **Cash** and then follow the on-screen instructions.
4. Enter a meaningful name for the account, such as Reimbursables.
5. When you get to the starting date and opening balance dialog, enter today's date and the amount of outstanding reimbursable expenses. Quicken will display this as a positive amount in the Reimbursable account's register. If you're not currently owed any money, enter zero.

Recording reimbursable expenses

In the future, follow this procedure when you record reimbursable expenses in your checking or credit card account:

1. In the checking or credit card account where you make the expense, [record the transaction in the account register](#), as usual. This is an expense transaction. This transaction should reduce the balance of the checking account.

2. In the Category field, instead of [assigning a category to the transaction](#), click the Transfers tab on the left of the Category List and choose the reimbursable account you added. Quicken adds this amount to the balance of the reimbursable account.

Recording a reimbursement


In the future, follow this procedure when you record the reimbursement:

1. In the account where you receive the reimbursement, [record the transaction in the account register](#), as usual. This is a deposit transaction. This transaction should increase the balance of the checking account.
2. In the Category field, instead of [assigning a category to the transaction](#), click the **Transfers** tab in the **Category** List and choose the reimbursable account you added. Quicken subtracts this amount from the balance of the reimbursable account.

When you've received reimbursements for all your outstanding expenses, the balance of the Reimbursement account will be zero.

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To add an account:

1. Select the **Add Account**  icon on the top right of the **Account Bar**.
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3. Select **Cash** and then follow the on-screen instructions.
4. Enter a meaningful name for the account, such as Reimbursables.
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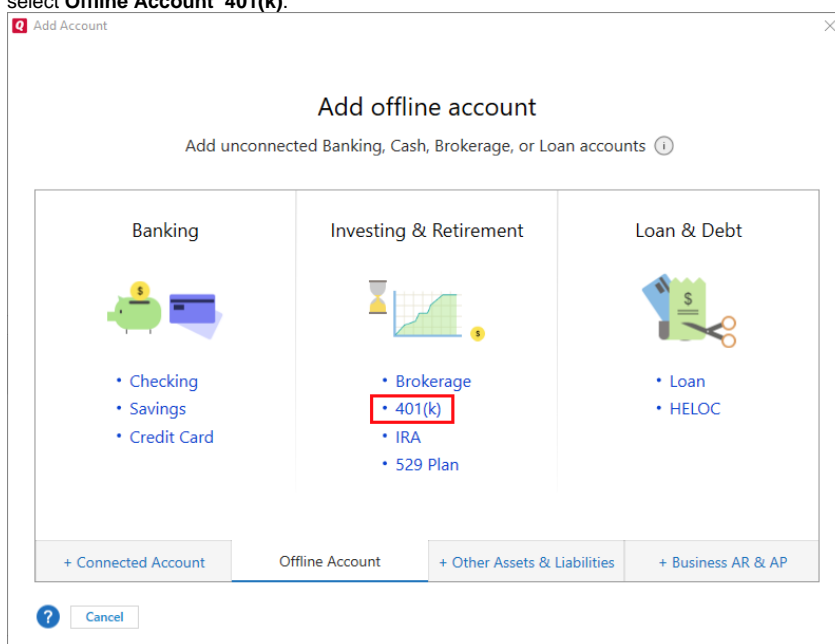
When you've received reimbursements for all your outstanding expenses, the balance of the Reimbursement account will be zero.

1. Select the **Add Account**  icon on the top right of the [Account Bar](#).



You can also add a new account by selecting **Tools** **Add Account** from the top menu.

2. If the financial institution that manages your **401(k)/403(b)** is available online, use the search to find the financial institution, otherwise select **Offline Account 401(k)**.



3. Follow the on-screen instructions. For more information, see below.

Simple Setup wizard

As you move through the account setup process, you may not see all the pages described below—these depend on the type of account you are adding and how much information Quicken can download from your financial institution. Click a link below for more information.

Select the type of account you would like to add to Quicken.

If your bank or brokerage is listed on the screen, click it.

If your bank or brokerage is not listed on the screen, start typing its name. After you type a few characters Quicken displays a list of possible matches. If you see what you are looking for, go ahead and click the name of your bank or brokerage. If you don't see what you are looking for, click Back and try again.

If you've tried a couple of times and you can't find your bank or brokerage in the list, or if you want to enter your transactions manually, click Advanced Setup and then choose I want to enter my transactions manually. You can always activate it to download transactions or send payments later on (if your financial institution supports bill pay).

Quicken needs to know your bank or brokerage name to find out if it can download transactions for you.

Downloading transactions will:

- Save you from manually entering your data
- Ensure data accuracy
- Help you detect invalid or fraudulent transactions

If you don't enter the name of your bank or brokerage, Quicken won't be able to download transactions for you. You will therefore have to manually enter your transactions into Quicken.

If you have set up Quicken to track multiple [currencies](#), select one from the list. If you decide you need to change the currency for the account, you can do so only if you haven't entered any transactions except the opening balance.

Quicken needs this information so it can download your account information. For most banks and brokerages, you can use the same user ID and password you use to log in to their website. If you don't have a user ID and password right now, add the account manually. You can always activate it to update transactions or send payments later on.

It may be an account number or some other number assigned by your bank or brokerage. It may also be the user ID you use to log in to their website.

Yes. If you entered the user ID that you use to log in to your bank or brokerage website in the user ID field, then enter the website password as well.

Direct Connect is a service some banks and brokerages use to connect to Quicken. You will know if you have Direct Connect if you specifically signed up for it and/or your bank or brokerage sent you a special user ID and password to use with Quicken. If so, use your Direct Connect login information on this screen.

If you did not receive special login instructions, use your website user ID and password here.

If you are not sure what to do, use the user ID and password you would use to log in to your bank's website.

Yes. To see the password while adding an account, select the Show Characters box to the right of the password box.

Your password will be saved in the Quicken Password Vault.

Quicken's Password Vault is a secure and convenient way to store multiple financial institution passwords that you can then access with a single master password.

- You can open the Password Vault to add, remove, or change stored passwords at any time.
- When the Password Vault was developed, it went through a rigorous security review.
- The Password Vault uses industry-standard encryption to save your passwords, and it is careful to remove them from memory when they are no longer being used.

Sometimes Quicken needs more information to determine what type of account you have, or at what branch the account resides at before it can access it. If you are not sure, here are some tips that may help you:

Account Type

If different types of accounts are shown, such as checking, savings, or credit card, choose the account type that applies to you.

State or Location

Some banks and brokerages use a state or region to classify accounts. If you see your state listed, this is probably the option to select.

Bank Mergers

Did your local bank or credit union merge with a larger bank? If you see your old or pre-merger bank name listed, this is probably the option to select.

Having trouble? Contact your bank or brokerage for instructions.

After you tell Quicken how to access your bank or brokerage, it goes online and downloads information about the accounts you hold there. Quicken then asks you to provide a bit more information about the accounts.

We have found the following

This is a list of your accounts that Quicken has detected at your bank or brokerage.

Account Type

You may see various items in this list: Checking, Savings, Credit Card, Brokerage, IRA or Keogh plan, or 401(k). Choose one that best matches the purpose of your real-world account.

Add, Ignore, or Link

Quicken needs to know what you want to do with the accounts it has found. Keep in mind that you don't need to set up all of the accounts it finds; just the ones that you want to track in Quicken.

Choose **Add** to create a new Quicken account in which to download your transactions. If you are new to Quicken, this is probably the option that you want.

Choose **Link** to download your transactions into an existing Quicken account. If you have previously set up the account in Quicken, but are not yet downloading transactions into it, this is probably the option you want.

Choose **Ignore** to disregard one of the accounts that Quicken has found. No account will be created, and transactions for that account will not be downloaded into Quicken.

Nickname (Optional)

Enter the name you want to use to refer to the account in Quicken. This name will appear in reports, and in the Quicken interface. If you don't enter a nickname, Quicken will use the name provided by your financial institution for the account.

Used mostly for

If you are using Quicken Home, Business & Rental Property, choose the primary use of the account: Personal (which is the default), Business, or Rental Property. Your selection determines where in the Quicken interface (on which tab) the account appears. You can change this from the Account List later if you wish. the account appears. You can change this from the Account List later if you wish.

You will receive confirmation that your account, or accounts, have been added to Quicken. Depending on the type of account you are adding there may be other steps you need to take. This screen will tell you what you need to do, if anything, to start using the accounts. Congratulations!

If you have chosen to use mobile as a part of your Quicken Registration, on this screen, you will get an option to sync the added account to the cloud. If you wish to add this account to the cloud, select the Sync to Quicken cloud for Mobile / Alerts check-box next to the account that you have added.

You will see this option only if you have chosen to Use Mobile as part of the registration. If you wish to view your accounts in mobile or to receive custom account notifications, click the Mobile and Web tab and follow the instructions.

Advanced Setup wizard

For most users, Simple Setup is all they will need to add their accounts. If you need to use Advanced/Manual Setup you will see a few additional screens. Click a link for more information.

Enter a name for the account. The name you type will appear throughout Quicken to distinguish this account from others. Use any combination of letters, numbers, spaces, and other characters except these: [(left bracket),] (right bracket), / (slash), : (colon), | (bar), ^ (caret).

1. Enter a name for this account.
Account names usually appear in alphabetical order in Quicken. If you and your spouse both have a 401(k) account, or you have 401(k) accounts from previous employers, begin each account name with something similar, such as "401(k) for Terry" and "401(k) for Chris." This way, all your 401(k) accounts will appear next to each other in lists throughout Quicken.

1. Enter the ending date from your statement.

Caution

If you're entering information from your financial institution's website instead of from a paper statement, and if this date is today's date, then don't download transactions for this account until tomorrow. This is necessary in order to reconcile your Quicken account data with account data posted by your financial institution.

2. Enter the name of your employer and whether this is your current employer or a previous one.
3. Identify the owner of this account: you or your spouse. Quicken uses this information to assign the correct tax-related category to transactions.

Select the appropriate check box. If you have loans, indicate how many.


If you selected the check box to indicate that you have a loan, Quicken helps you track it in a loan account.

1. Enter a description (for example Home Down Payment).
2. Enter how much you currently owe.
3. Do you want Quicken to add a loan account to track how much you owe? If so, select the Set up account check box.
4. Enter the original amount you borrowed for this loan.

Do the following for each security you hold in this account:

1. Under the Ticker field, enter the ticker symbol for the security. If you know the security ticker, Quicken will download the name for you.
 - If you don't know the ticker symbol, click the button labeled Ticker Symbol Lookup.
 - If the security doesn't have ticker symbol (for example, a proprietary security sold by your financial institution), enter a security name in the Security Name.
 - Don't enter bonds in this dialog. When you're finished setting up securities, open the transaction list, click Enter Transaction, and then choose Bond Purchase.
2. When you've finished for each security, click Next.

Do the following for each security you hold in this account:

1. Enter the number of shares and total market value. (If your financial institution doesn't report the number of shares, you can enter the market value.)
2. Select the appropriate security type: Stock, Mutual Fund, or Other.
3. Click Next.
1. Confirm your settings from the previous setup windows.
2. Check to see that your information is correct:
 - Is the statement date correct?
 - Are all your securities (mutual funds) listed?
3. Click Previous to return to previous windows and make changes.
4. When you're finished, click Done.
After you click Done, you'll see summary graphs and reports in the 401(k) account Summary tab. Some of the details won't matter much yet, because you've only entered one statement.
5. When you're ready to enter your next statement, open the [account](#), click  (the Account Actions icon), and then choose Update 401(k) Holdings.

Notes

When Quicken adds a 401(k)/403(b) account, it also creates a special tax impact account. This account tracks all the transactions associated with your retirement account that can have an affect on your taxes (for example, if you withdraw funds from your retirement account prematurely). Quicken uses this information in some tax reports and planning tools. The tax impact account does not appear in your Account List, but you can drill down to tax impact account transactions in tax reports. You should not edit or delete such transactions, or the account itself, in any way.

Updating transactions and balances in your Quicken accounts is easy.

1. Choose **Tools** menu > **One Step Update**.

- **What to know about this**

One Step Update is the centralized access point for almost all connected services in Quicken. It makes it easy to:

- Download the latest cleared transactions and balances for all your [online-enabled](#) bank, investment, 401(k), and credit card accounts.
- Send or cancel online payments (not supported by all financial institutions).
- Transfer money between accounts at the same financial institution, if you are connected via [Direct Connect](#).
- Sync your data to the Quicken Cloud and [use Quicken on your phone or tablet](#).
- Download [security quotes](#), download [currency exchange rates](#), export some of your Quicken account information to Quicken.com, and obtain [product updates](#) for your Quicken software.

Note: One Step Update doesn't work with [Web Connect accounts](#). Quicken may be able to upgrade accounts you currently update through your financial institution's website to another connection type that you can use with One Step Update. If this is the case, Quicken will let you know.

2. Enter your password(s).

- **Tell me more**

Depending on how you [manage your financial institution passwords](#), this may be the password for each account you want to update, or the password for the Quicken Password Vault.

3. Choose what to update. (Optional)

- **Tell me more**

If you are using the Password Vault, click Settings immediately after typing your password to display the One Step Update Settings dialog.

Under the **Download Transactions and Balances** heading, choose the accounts to update and bill payments to send (if any). Only [online-enabled](#) bank, investment, 401(k), and credit card accounts appear in the list.

Under the Online Services heading, choose the connected services and features to update:

- **Sync to Quicken Cloud**

Select this option to sync your data between your desktop software and Quicken on your phone or tablet. Click (manage accounts to sync) to select the accounts you want to sync to the Quicken Cloud. To learn more, see [Using Quicken on your phone or tablet](#).

- **Download quotes and investment information**

Select this option to download the latest security prices and data for your investments. Click (select quotes) to choose the securities that you want to update. To learn more, see [Update security prices \(get quotes\)](#).

- **Get currency exchange rates**

Downloaded currency exchange rates is a feature available in Quicken Premier, Home & Business, and Rental Property only. To learn more, see [Download currency exchange rates](#).

- **Update portfolio on Investing.Quicken.com**

Select this option to monitor your Quicken investment data on [Quicken.com](#). Click (select investing data to sync) to set your preferences and choose the accounts you want to sync. To learn more, see [Customize my Quicken.com portfolio options](#).

- **Sync your reminders to Outlook**

Select this option to transfer your reminders to your Microsoft Outlook calendar. To learn more, see [Sync your Quicken reminders with Outlook](#).

- **Find out why an account is not in the list**

To learn more, see [What if my account does not appear in the One Step Update window?](#)

4. Click Update Now.

- **Why does the Settings dialog display?**

If you are sending online bill payments, the One Step Update Settings dialog displays. This gives you a chance to review and confirm your bill payments before sending them. Click Update Now again when you are ready.

5. A progress window provides status while your accounts are updated, and the One Step Update Summary window displays when the update completes.

- **Tell me more**

- **About the One Step Update Summary**

The One Step Update Summary window contains information about the number of accounts updated and transactions downloaded. For specific information about what was downloaded, click the accounts updated link under the financial institution name. Also displayed in the window is information about any errors that may have occurred during the update.

- **What if I don't see the One Step Update Summary?**

If the summary doesn't display, and you want to see it, choose Tools menu > One Step Update Summary.

- **Can I turn off One Step Update Summary?**

Yes you can. In the One Step Update Summary window, select the Show this dialog only if there is an error check box. In future updates, Quicken displays the summary information only if an error occurs during the update.

- **What does "Show just the last update" mean?**

Select this option to see a summary of only your most recent One Step Update; deselect this option to see summary information for all of your connected financial institutions and services, including those not updated in your most recent One Step Update.

- **Can I see when an account was last updated?**

Yes you can. In the One Step Update Summary window, click the link for the number of accounts updated. It displays the amount of online balance followed by the date on which the account was last updated.

6. Click Close in the One Step Update Summary window when you finish reviewing it.

Notes

- **Set up scheduled updates**

You can [schedule updates](#) to connect to your financial institutions to regularly download cleared transactions at a time that you specify.

- **Check for free software updates**
Each time you start a One Step Update session, Quicken checks to see if there is an update to the Quicken program. If an update is available, Quicken asks if you'd like to download the update.
- **Determine if (and how) an account is connected**
The best way to determine if (and how) your account is connected is by using the Account List. To do so, choose Tools menu > Account List and look in the Transaction Download column for your account. This will let you know if it is connected, and by what method. If you want to establish or change your connection method, click the Edit button next to the account name, and then click the Online Services tab.
- **Permanently exclude an account from One Step Update**
To permanently remove an account from One Step Update, [deactivate the online account services](#).
- **Update an account by downloading and importing a file**
This isn't the best way to update an online-enabled Quicken account. It's often time-consuming, and any of the standard Quicken [connection methods](#) provide a much faster and easier experience. However, downloading and importing a file can be useful if you are having connectivity problems, or if you want to update an account that isn't online enabled. Here's how:
 1. Log in to your financial institution's website.
 2. Navigate to the download page and click the Quicken logo or **Download to Quicken**. The exact location of the download page is determined by your financial institution. It is frequently in an area of the website identified as the **Download** or **History** area.
 3. Your browser will download a **Web Connect file** that contains your account transactions (you can recognize such a file by the .QFX extension in its file name).
 4. Return to Quicken and choose **File** menu > **File Import** > **Web Connect File**.
 5. Navigate to, and then select the **Web Connect** file you just downloaded.
 6. Click **OK**.
 7. Give the account a name. Or, if you already have an account in Quicken for these transactions, choose Link and the account name in the dialog that follows.
 8. After Quicken finishes importing the file, [open the account](#). Quicken will either automatically add them to your register, or you can [review and accept](#) the imported transactions, depending on your [downloaded preferences](#).
- **About Direct Connect, Express Web Connect, and Web Connect**
The connection methods available to you depend on your financial institution and your account type.

Express Web Connect (Free)

Express Web Connect provides an integrated way to update transactions and account balances for financial institutions that do not currently connect directly to Quicken. With Express Web Connect, you can use One Step Update to update multiple accounts, and you no longer have to go to a financial institution's Web site to retrieve transactions.

Direct Connect (Fees may apply)

Direct Connect is a service some banks use to connect to Quicken. You will know if you have Direct Connect if you specifically signed up for it and/or your bank sent you a special user ID and password to use with Quicken. Some financial institutions require Direct Connect to use services such as bill pay, or transfers via Quicken.

Web Connect (Free)

Many financial institutions offering Web banking also let you download your Web transactions into Quicken. If you already have a password, and if the website displays the Quicken logo or contains a button or link that says Download to Quicken, this means that your financial institution supports the Web Connect protocol for downloading and importing transactions into Quicken.

To learn more

See [Tell me about the connection methods used by online services](#).

When you delete a transaction, Quicken removes the transaction from the register and recalculates all subsequent balances. You can't get the transaction back unless you have a backup copy or unless you immediately undo the delete (and undo delete is not available for all account types). Delete transactions with caution; voiding a transaction is often a better option. Voiding leaves the transaction in the register (so you can maintain a record of it) but ignores the amount when calculating balances.

Void a transaction

1. From the account register, click any place in the transaction that you want to void. You can use **CTRL + click** to select several transactions at once.
2. Choose **Edit** menu > **Void Transaction**.
3. Click **Save**.

Notes

- When you void a transaction, Quicken removes the dollar amount of the transaction and inserts the word *****VOID***** before the payee name. Quicken also adds a c to the Clr field so that the transaction won't interfere with reconciling. If the transaction contains split amounts, Quicken changes each amount to zero. The check number is retained.
- Don't void an online payment instruction. If you do, Quicken can't get the confirmation number it needs to stop the payment. [Cancel the online payment instruction instead](#).
- In addition, you can't void an investment transaction.

Delete a transaction

1. From the account register or an investment transaction list, select the transaction that you want to delete.
2. For investment transactions, click **Delete** directly under the transaction.
3. For all other transaction types, click the gear icon (⚙️) in the transaction toolbar and then choose **Delete**.
4. Click **Yes** to confirm that you want to delete the transaction.

Notes

- When you delete a transaction, Quicken removes the transaction from the register and recalculates all subsequent balances. If you need to retain a record of the transaction, consider voiding it instead.
- You can restore your most recently deleted transaction for any non-investment account by choosing Edit menu > Transaction > Undo Delete. You must perform the undo within the same Quicken session and from the same account from which the transaction was deleted. If several transactions were selected and deleted in one operation, Undo Delete restores all of them.
- Use CTRL+click or SHIFT+click to select multiple transactions in an account register (does not work in an investment transaction list).
- If you delete a transaction that includes a transfer, Quicken deletes the transfer from both the source and destination accounts.
- You can protect transactions from being deleted accidentally by [requiring a password](#) before opening a file or before changing transactions entered on or before a certain date.

It's a good idea to back up your work each time you use Quicken, even if you have plenty of space on your hard disk. If your hard disk fails, you'll need to [restore](#) your files.


You can back up your **Quicken** data to USB drives, CDs, DVDs, and so on.

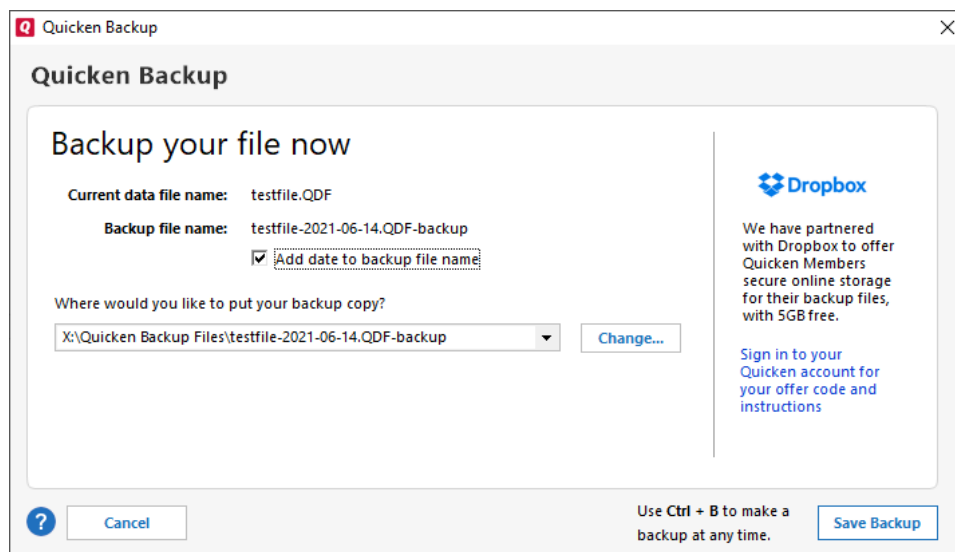
Another way to safeguard your valuable Quicken data is to back it up every day to a remote location.

Quicken provides you with a free subscription to **DropBox**, a service that lets you store files in the cloud. This helps prevent losing important data if your computer crashes. Use **Dropbox** to store your **Quicken backups**. To learn how to set up DropBox visit [this support article](#).

Back up my Quicken data file to my computer or to an external source

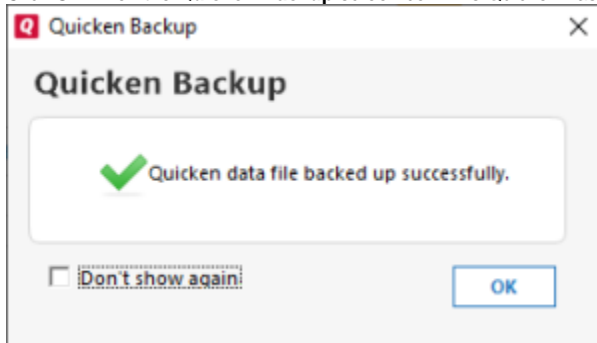
1. Insert or attach the external media you want to back up your Quicken data file to.
2. If it isn't already open, [open](#) the data file you want to back up.
3. Type **Ctrl + B**. The **Quicken Backup** screen will appear.

 You can also navigate here by selecting **File** menu **Copy or Backup File**, then selecting **Create a complete backup** and **Next**.



4. To identify the location you want to save the file to, select **Change** and navigate to the appropriate media and directory.
5. Click **Save Backup** to start the backup.

- Click **OK** when the **Quicken Backup** screen confirms Quicken has backed up the file successfully.



- Remove the backup media and store it in a safe place.
- To create a second backup copy, repeat the previous steps.
- To view the data you backed up, use [restore](#).

How to back up your file to DropBox

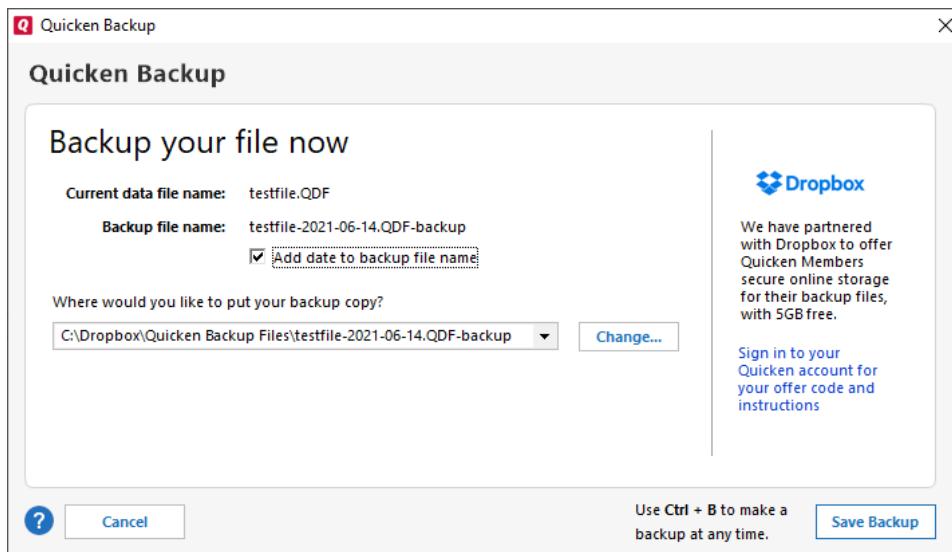
Quicken provides you with a free subscription to **DropBox**, a service that lets you store files in the cloud. This helps prevent losing important data if your computer crashes. Use **Dropbox** to store your **Quicken backups**. To learn how to set up DropBox visit [this support article](#).

i **Dropbox** is **not** intended to be used to share a single Quicken data file between multiple computers or users. **Use DropBox only for backups**. Never store and access your active data files using **DropBox**.

Once **DropBox** is set up.

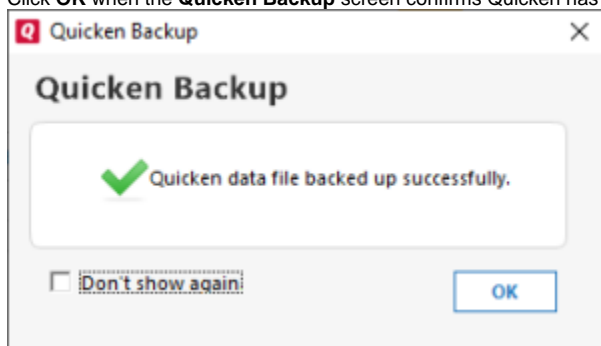
- If it isn't already open, [open](#) the data file you want to back up.
- Type **Ctrl + B**. The **Quicken Backup** screen will appear.

i You can also navigate here by selecting **File** menu **Copy or Backup File**, then selecting **Create a complete backup** and **Next**.



- To identify the location you want to save the file to, select **Change** and navigate to your **DropBox** directory.
- Click **Save Backup** to start the backup.

5. Click **OK** when the **Quicken Backup** screen confirms Quicken has backed up the file successfully.



6. To view the data you backed up, use [restore](#).

Notes

- **About backing up to USBs, CDs, and floppy disks**

Select the type of media are you using:

- [Removable \(USB\) drive](#)
- [CD](#)
- [Floppy disk](#)

- **What if I need more help troubleshooting?**

General troubleshooting information about Quicken's backup and restore feature is available [in-product](#) and on the [Web](#).

- **What if I want to change the backup options?**

Quicken includes several backup options that you can [change](#) to meet your needs.

After you've set up your Quicken desktop software, you might want to change your Quicken ID password. Here's how:

1. Choose **Edit** menu > **Preferences**.
2. In the left pane, select **Quicken ID & Cloud Accounts**.
3. In the right pane, under **Quicken Profile**, select **Update Profile**.
4. The **My Account** screen displays.
5. Select **Change Password**.
6. Enter your **Current Password**.
7. Enter your **New Password**.
8. Click **Save Changes**.

Remember to change the password to match on the mobile devices that you want to sync with this data file.

You can run only one instance of Quicken on a single computer at this time. However, there are several things you can do to give more than one user access to the Quicken data file.

The Quicken data file resides in the default folder of the user who installed Quicken (User 1). If another user (User 2) wants to access the Quicken data file, you must either:

- Grant User 2 administrator rights on Windows, and then have User 2 open the Quicken data file in User 1's data folder. If you need additional assistance, refer to Windows Help.
- Copy the Quicken folder for User 1 to the shared documents location on the hard disk.

To copy the Quicken folder for User 1 to the shared documents location:

1. In Windows Explorer, navigate to the [Quicken](#) folder.
2. Select the **Quicken** folder.
3. Choose **Edit** menu > **Copy**.
4. Still in **Explorer**, go to the shared documents location on the hard disk. The shared documents location is typically **C:\Users\Public\Public Documents**.
5. Select the **Shared Documents** folder.
6. Choose **Edit** menu > **Paste**.

the Address Book is fully integrated into Quicken. See the Notes section below to learn more.

To add or update address and contact information in the Address Book

1. Choose **Tools** menu > **Address Book**.
2. To add a new address, click **New**.
3. On the **Payee** tab, enter a payee name. A payee name is required when you add a contact to **Address Book**. You can enter as much additional detail as you want.
4. To edit an address, select it from the **Address List** (if necessary, first select the proper group from the Group drop-down list), and then click **Edit**.

5. Click the **Contact** tab and enter as much detail in the fields as you want.
6. Click **Use Payee** to copy the **Payee** name (from the Payee tab) into the Name or Organization fields. (Optional)
7. Click the **Documents** tab to upload documents pertaining to this person. You can upload documents only for a customer or a vendor. You can upload any agreements you may have with this person or any ID proof / Address proof of this person etc for future references. To do this, click on '**Attach**' and upload a scanned copy of this document. You can add '**Notes**' to enter any extra information about each document.
8. Click **Format** to format the information for [printing](#). (Optional)
9. Click **OK**.

To update an address from the Memorized Payee or Bill & Income Reminders List

1. From the **Memorized Payee List** or **Bill & Income Reminders List**, select the payee you want to update.
2. In the **Action** column, click **Edit**.
3. Click **Address**.
4. Update the address and any other necessary information in **Address Book**.
5. Click **OK**.

To update an address from the Write Checks window

1. Choose **Tools** menu > **Write and Print Checks**.
2. Enter the payee name.
3. Click **Edit Address**.
4. Update the address and any other necessary information in **Address Book**.
5. Click **OK**.

To update an address from a business form

1. From the **Edit Estimate** or **Edit Invoice** window, enter the customer or vendor name you want to change.
 - Quicken will fill in the address fields for you if the address is in the QuickFill List.
 - Otherwise, enter the address you want to update.
2. Make any changes necessary, and save the form.
 - In the Update Address dialog, click Update to update the existing address in the Address Book, or
 - Enter a unique identifier in the Description field to distinguish the changed address from the existing address in Address Book, and then click Add.
3. Quicken displays the payee name in the Address Book window with the identifier enclosed by braces (for example, Financial Institution {Credit Card}). The identifier is for tracking purposes only and won't display on printed checks or forms.

To add payees to the QuickFill list

Quicken has several automatic features for data entry. Together, these features are called QuickFill. When you're entering data in the Address Book, register, Write Checks window, or Split Transaction window, QuickFill completes each field after you type a few letters. QuickFill also provides drop-down lists so that you can find items such as payee names and categories quickly.

1. Choose **Tools** menu > **Address Book**.
2. Click **New**.
3. Enter the payee information.
4. Select the Include this Payee in QuickFill List check box.
5. Click **OK**.
6. Choose **Edit** menu > **Preferences** > **Register**.
7. In the left navigation pane, click **QuickFill**.
8. Select the **Add Address Book QuickFill items to Memorized Payee List** check box.

Notes

Other than what I enter directly, is additional contact information included in Address Book?

Yes.

- In addition to the contacts you add to Address Book, the Address Book contains the payee names and addresses you've created in the Memorized Payee List, Bill & Income Reminders List, and the Write Checks window.
- Items on the [Memorized Payee List](#). Items on this list **QuickFill** for you in any appropriate fields (for example, customer name and address fields on estimates and invoices if you use Quicken Home & Business) after you type a few letters.
- You can add or update contact information from any of the above locations. If you use Quicken Home & Business, you can also manage contact information from any business form you may need to submit to a customer or a vendor (for example, estimates and invoices and payments to vendors).

If I modify a contact in the Address Book, will it be updated elsewhere in Quicken?

- Any changes you make to the contact information in the Address Book are reflected in your Bill & Income Reminders List. If you use Quicken Home & Business and your payees have been added to your Customer and Vendor Lists, these lists are updated as well.

- Address Book updates the information in your Reminders and Memorized Payee Lists, and the Write Checks screen, but it does not update the Online Payees list. To do this, choose **Tools** menu > **Online Center** > **Payees**. Your payment processor may [not allow you to change certain online payee information](#) (for example, the address of a payee for which there are pending online payments).

What if I have two very similar payees?

- When you change the address of a payee, Quicken asks if you want to update the existing payee or create a new one. If you enter the same payee name with a different address, you must add a unique identifier to the name to distinguish one payee from the other.

The password vault is a Quicken feature that allows you to store all the passwords for financial institutions you access through Quicken. You can then access your secure accounts by entering a single **Password Vault** password.

To maintain a secure system, you should change your **Password Vault** password from time to time. See the section on [connected services and security](#).

To change your password:

1. Choose **Tools** menu > **Password Vault** > **Add or Edit Passwords**.
2. Click **Change Vault Password**. The **Edit your Vault Password** screen will appear.

3. In the **Edit your Vault Password** window, enter and re-enter your new password.

Password Requirements

For security purposes, the password you choose must be at least six characters in length. We suggest you choose a password that contains:

At least one digit (0 to 9)

At least one letter (a to z)

Other Security Steps

The **Password Vault** is designed for high security, but factors such as a well-chosen password, physical security for your computer, and proper safeguards when you use a network or the Internet are all important. Since most of these factors are beyond Quicken's control, Quicken is not liable for safeguarding your password data.

Additional information

- [Appendixes](#)
- [Tell me about finding Quicken contact information in my Quicken software](#)
- [Tell me about keyboard shortcuts in Quicken](#)
- [Safeguarding your computer and data](#)
- [Quicken Terms of Use](#)
- [History of Quicken improvements](#)
- [What's new and what's changed in Quicken 2019](#)
- [About tracking your income and expenses in Quicken](#)
- [How is this different from what I do today?](#)
- [Why is this important? \(Password Vault benefits\)](#)
- [About reconciling a spending account \(checking, savings, or credit card\)](#)

- About tracking credit cards
- About paying bills in Quicken
- About updating spending accounts (checking, savings, and credit card)
- Why is this important? (Privacy)
- Select accounts for the Account Balances graph
- Are these transfers between accounts?
- Updating credit card transactions
- Reminder: Changed or deleted repeating online payment
- Do you want to switch from CheckFree to online payment?
- Marketplace/Financial Institution News tab banking and investments
- Is this a transfer or credit card payment?
- About changing my connection method when activating online payment
- Changing online payment processors
- Changes to how your payments are processed
- Online payment Settings window
- Update Account Information
- Schedule or enter a transaction
- Select Account to Reset
- Restrictions while changing service providers
- Before you inquire about an online payment
- Create/Change Vault Password
- Status column icons
- About the current balance (In/Out/What's Left)
- About the checking balance (In/Out/What's Left)
- About the ending balance (In/Out/What's Left)
- About the cash flow difference (In-Out)
- About the amount saved this month (In/Out/What's Left)
- About the total available (In/Out/What's Left)
- About projecting cash flow (business)
- Tell me more about business transactions without a tag
- Why aren't individual investments projected?
- When should I rebalance?
- Asset class
- Current Value
- Target %
- Off by % points
- Adjustment
- Why include my spouse and children?
- What are the rules for tax-deferred distributions?
- What's a reasonable guess for the inflation rate?
- What rate of return am I currently getting?
- Does the average tax rate include taxes on capital gains?
- My percentage difference is zero, but I still have an adjustment.
- Taxes on distributions from tax-deferred retirement plans
- What if I receive an error message saying that the payee information could not be updated?
- Add new email addresses for invoices
- Taxes on gains from the sale of a home