

# About Simple Tracking


**Simple Tracking** is an investing feature aimed at customers who want to see the value of their investments, but not the information related to transactions. For users who either aren't interested in transaction information or perform their tracking and analysis elsewhere, this can reduce the complexity of using Quicken to track your investments. **Simple Tracking** is for customers who want a straightforward view of their investments. It only tracks your positions. It does not track the transaction data that some customers don't need or have trouble interpreting. When you don't need detailed investment tracking information, **Simple Tracking** gives you the most important information about your investments.

When you create a new account, you will have the option to choose between **Simple Tracking** and **Detailed Tracking**. Choose the best option for you.

Add Brokerage Account

Choose how you would like to track this investment account

☒



Simple Tracking

Easy tracking with positions only

✓

Track your positions and cash balances


✓

View portfolio value and net worth over time

✓

Keep your portfolio in sync with your brokerage

☐



Detailed Tracking

Complete transaction & position tracking

✓

Includes features from Simple Tracking

✓

View and edit your investment transactions

✓

Track capital gains/losses, investment income, and more

?

You can change your selection at any time from Account Settings

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Learn More

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You can also change the tracking for an existing account.

1. Select the account you want to change, then select **Accounts** menu **Settings**. The **Account Settings** window will appear.
2. Select the **Details** tab if it is not already selected.
3. Under **Investment Tracking Method**, select either **Simple (Positions Only)** or **Detailed (Positions and Transactions)**.
4. Select **Done**. It's a good idea to update your investment accounts after you have made this change.



### Editing a Simple Tracking listing

To edit a security in a Simple tracking account, click the security name. A list of possible actions will appear.

| NAME                     | PRICE | PRICE DAY<br>CHANGE |
|--------------------------|-------|---------------------|
| > ARK Fintech Innovation |       |                     |
| > Bank of America        |       |                     |
| > Barrick Gold           |       |                     |
| > Digital Realty Trust   |       |                     |
| > Hormel                 |       |                     |
| > Meta Platforms         |       |                     |
| > Netflix                |       |                     |

**DLR**

- Edit Security
- Edit Share Price
- Edit Share Balance
- Security Overview

- **Edit Security:** Edit the **Security Name**, **Type**, and **Symbol**. Indicate if the security is tax exempt. Change the asset class.
- **Edit Share Price:** Edit the **Price** of a security and indicate the **As of Date** the change occurred.
- **Edit Share Balance:** Edit the **Number of Shares** and indicate the **As of Date** when the change occurred.
- **Security Overview:** Get more information about the security. This sends you to a web page about the security.