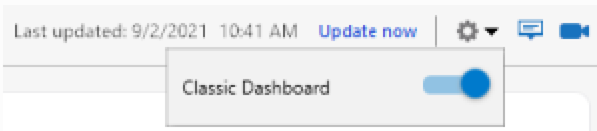
Using the Home tab (dashboard)

The **Home** tab is the central hub for using Quicken. It allows you to view your key financial information at a glance on the **Dashboard.** You can also add one or more views that can be customized to suit your needs. Below is information about what you can find on your **Home** tab and tips for customization.

You have a choice between our newer, **Modern Dashboard** and the **Classic Dashboard**.

The **Modern Dashboard** allows you to change the order of your financial cards such as **Top Spending Categories, Top Payees, Recent Transactions, Uncategorized, Investment Top Movers,** and **Portfolio Value**. It also offers newer interface tools and is the dashboard we will continue to update and refine going forward.

To switch between the **Modern Dashboard** and the **Classic Dashboard**, use the gear icon at the top of the **Dashboard**.

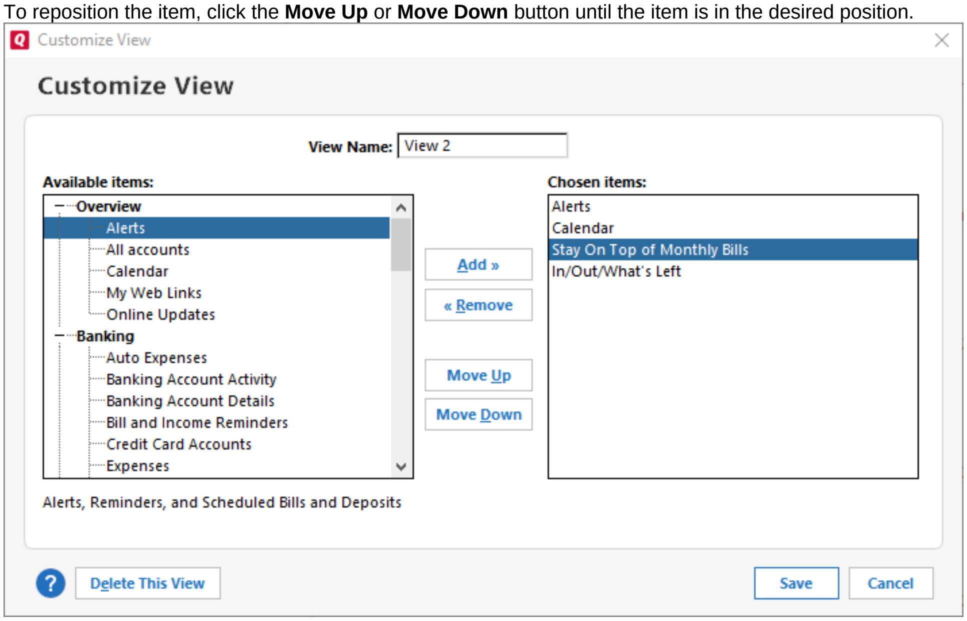


To add items to the Main View or to a custom view of the Home tab

1. Click the **Home** tab.
2. On the top of the page, click the required view name.
3. Click the Gear icon .
4. Select **Customize View**.
5. From the **Available Items** list, select the items to add to the selected view. (If necessary, click the plus sign next to a heading in the Available Items to display the list of items under that heading.)
6. Click the **Add** button.
7. Click **Save.**

To remove and rearrange items in a view

1. Click the **Home** tab.
2. On the top of the page, click the required view name.
3. Click the Gear icon .
4. Select **Customize View**.
5. From the **Available items** list on the right side of the **Customize View** dialog, select an item to move or delete.
   - To remove the item, click the **Remove** button.
   - To reposition the item, click the **Move Up** or **Move Down** button until the item is in the desired position.



6. Click **Save**.

To expand or collapse items in a view

You can expand or collapse the items in a view. Simply click the expand (plus) icon or collapse (minus) icon on the upper left side of the item panel.

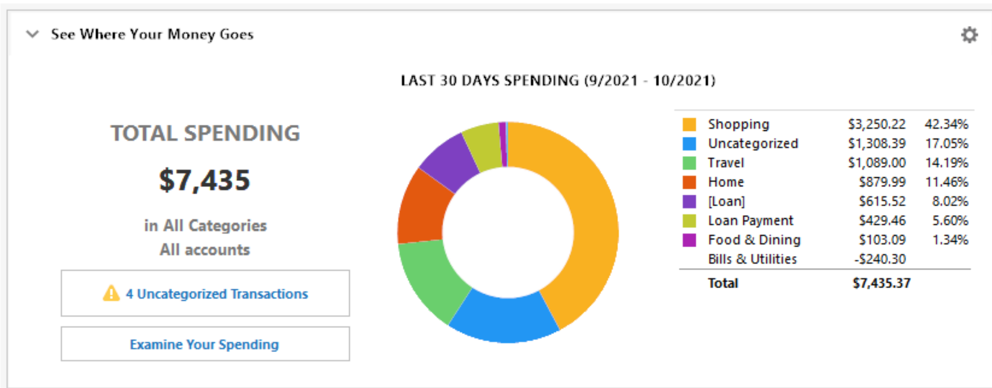
See Where Your Money Goes

This section shows you how much of your money is being spent on each of your spending categories.

To change the date range or the accounts included in the graph, click **Options** in the upper right of the section.

Only spending accounts can be selected for display. For most users, their checking account is their spending account. To see which of your accounts are spending accounts, choose **Tools** menu > **Account List** > **Personal Banking**. The accounts listed under the Spending header are your spending accounts.

Double-clicking the pie chart, any category name, or **Examine Your Spending** opens the Spending tab where you can review each transaction included in the pie chart and recategorize them if they are in the wrong bucket.



Stay on Top of Monthly Bills

This section shows you how much money you have coming in and going out, so you can pay bills on time and avoid late payments and overdraft charges.

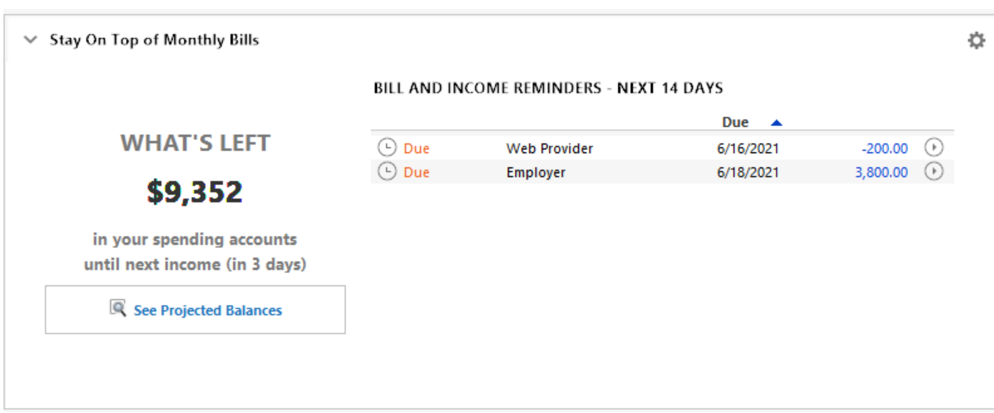
The list includes all upcoming bill reminders and scheduled income for the specified date range.

To change the time period, or to add a new reminder, click **Options** in the upper right of the section.

Any bill or income reminders that fall within the specified date range are displayed here.

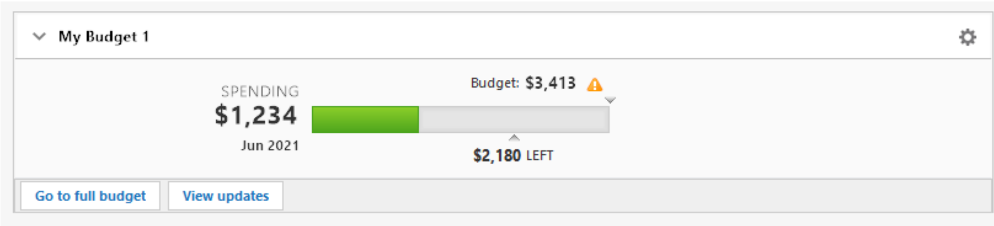
The **What's Left** section displays the total amount of unallocated funds you have in your spending accounts at the end of the specified time range.

You will also see a **Risk of Overdraft** or a **Projected Balances** button, depending on your account balances. Clicking either button displays the **Projected Balances** graph, which shows your spending account balances over time, based on the planned spending and income you have told **Quicken** about.



Budget Your Spending

This section shows you how you're doing against your budget. The card displays a summary graph of your total spending for the month. If you want more detail, click on the graph to see how much you are over or under budget, or click Options in the upper right of the section to add categories to the card or go to your full budget.



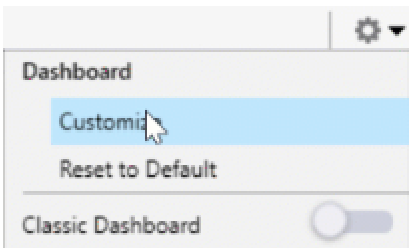
Using the Modern Dashboard

The Modern Dashboard has cards that display different aspects of your finances. It is an excellent place to start each time you use Quicken.

Hiding a card

To hide a card, click the three-dot menu at the top right corner of the card and select **Hide Snapshot.**

You can also go to the gear menu and select **Customize**.



You will see a list of the cards and can turn any of them off or on by clicking the **display** toggle**.**

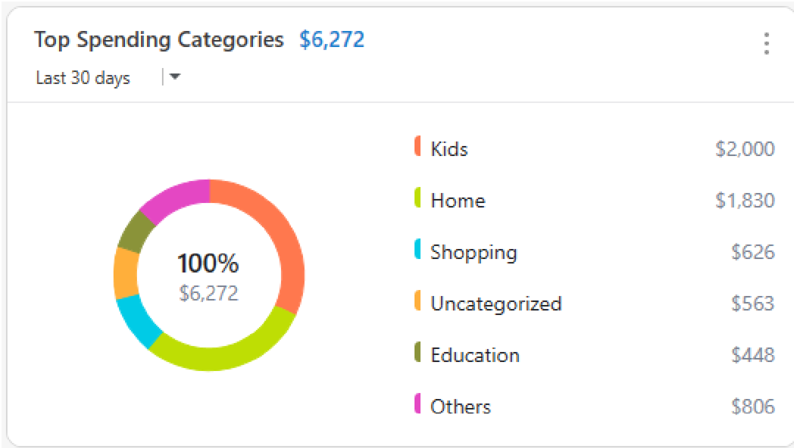
Available Cards

> The first time you come to the **Home** tab, if you have not added any data (set up your accounts), these cards will be blank. Select **Get Started** in each section to go through the setup process for that section. Once you've done this, the buttons go away, and you can simply use the **Home** tab to track your financial picture.

Top Spending Categories

The **Top Spending Categories** card shows what categories you are spending your money in. The default view is for the **Last 30 days**, but you can choose other time periods as well. You can hover your pointer over any category to see more information about your spending in that category. You can click a category to see the transactions associated with that category.

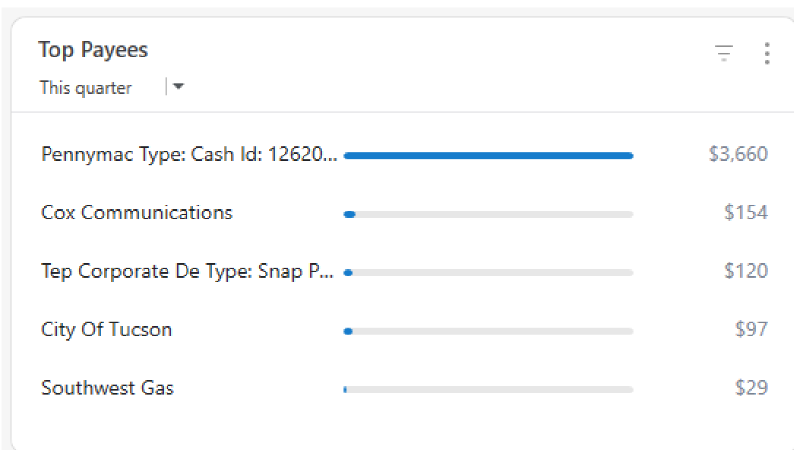
Click the three-dot menu if you wish to select specific accounts to display, rename the card, or delete the card.



Top Payees

The **Top Payees** card shows you the payees that have received the most money. You can adjust the date range to get a better idea of your spending over time. You can also hover your pointer over a payee to see how much money you have sent them, and what percentage of your total spending was given to that payee. Click a payee to see a spending report for that payee.

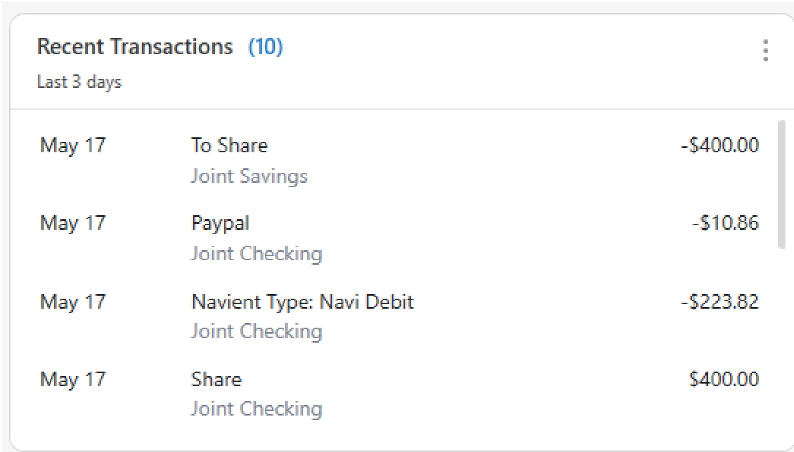
Click the three-dot menu if you wish to select specific accounts to display, rename the card, or delete the card.



Recent Transactions

The **Recent Transactions** card shows you what transactions you've made in the last three days. If you have many transactions, you can scroll through them on the card. You can also hover your pointer over a transaction to get more details about the **Account** and **Category**. You can click a transaction to see that transaction in your register.

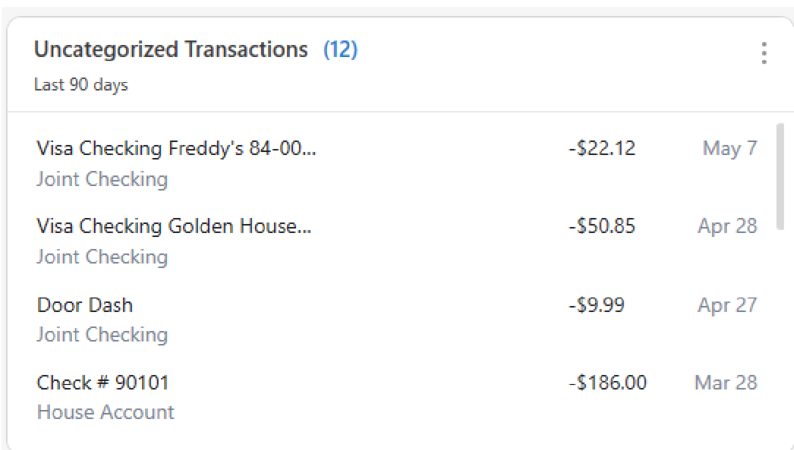
Click the three-dot menu if you wish to select specific accounts to display, rename the card, or delete the card.



Uncategorized

The **Uncategorized** card is an excellent resource that you can use to assign categories to your transactions. You can click any transaction to review it on a list of your uncategorized transactions.

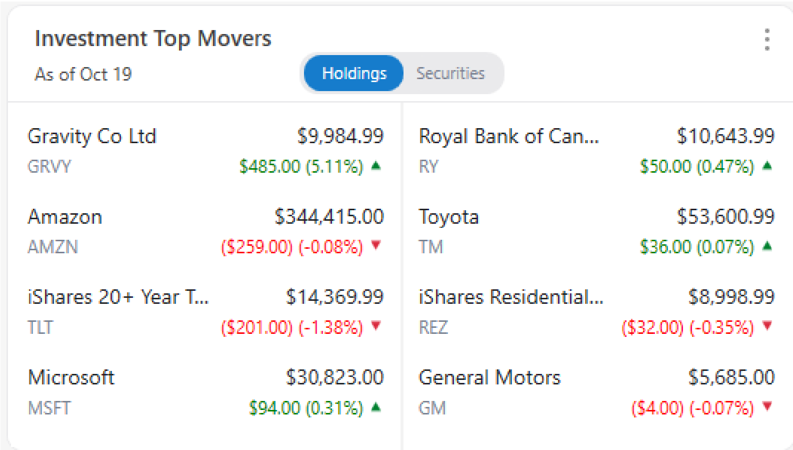
Click the three-dot menu if you wish to select specific accounts to display, rename the card, or delete the card.



Investment Top Movers

If you are using Quicken to track investments, the **Investment Top Movers** card will show the investments with the highest percentage change, either up or down. It will show the information for the day of your most recent update, listing the date on the card. During trading hours, the information will reflect a fifteen-minute reporting delay. You can also choose to view top movers in all of your holdings or only in securities.

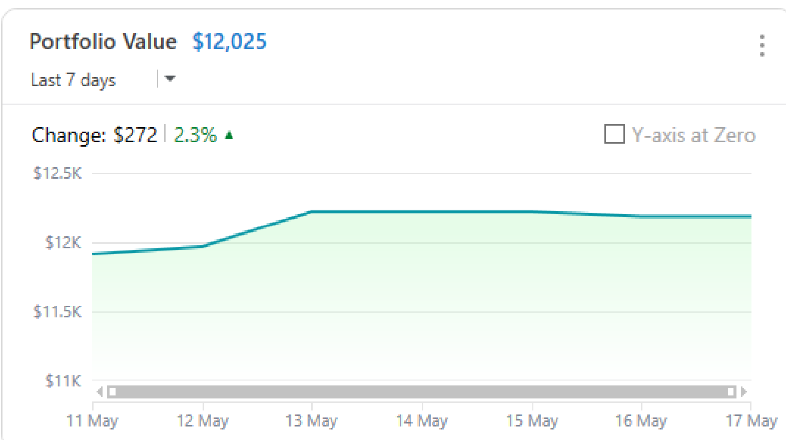
Click the three-dot menu if you wish to select specific accounts to update quotes, rename the card, or delete the card.



Portfolio Value

The Portfolio Value card shows the total worth of your investment holdings and tracks the change in value. You can choose from several different time periods. Turning off **Y-axis at Zero** will focus on the value changes rather than the total portfolio value.

Click the three-dot menu if you wish to select specific accounts to display, rename the card, or delete the card.



How do I customize a view on the Home tab?

You can create multiple views on the Home tab; add, delete, or rearrange the components that each displays. You can add up to a total of 40 snapshots, depending on your version of Quicken—so that each contains only the Quicken data that is most important to you.

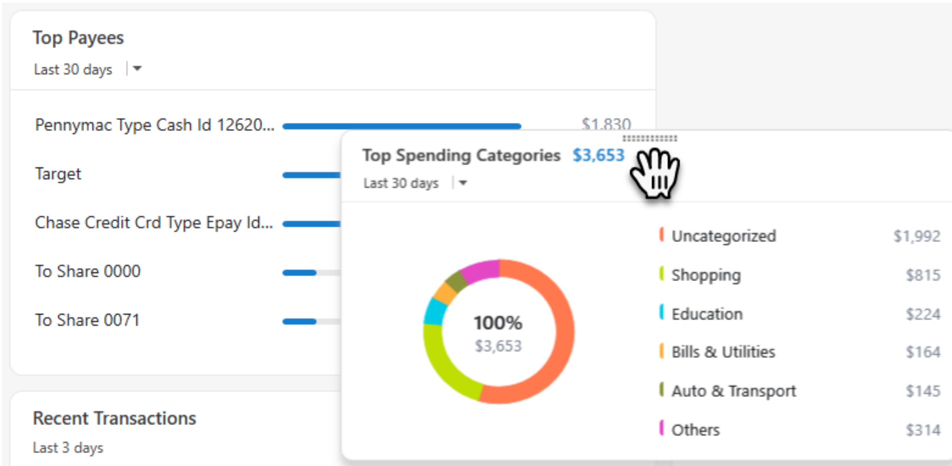
Quicken lets you create a total of 11 views to track different financial areas.

To add a custom view to the Home tab

1. Click the **Home** tab.
2. Click **Add View.**
3. Enter a name for the view.
4. Add any items that you want this view to display.
5. Click **OK**.

To arrange items to the Main View or to a custom view of the Home tab

1. Hover your pointer over the center top of an individual card. You should see a double row of dots.
2. Drag the card to where you want it to be located. The card will replace the one currently there, and the other cards will rearrange to reflect the new order.



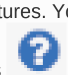
To navigate between views on the Home tab

1. Click the **Home** tab.
2. On the top of the page, click the required view name.

To delete a view

1. Click the **Home** tab.
2. On the top of the page, click the required view name.
3. Click **Customize**.
4. Click **Delete This View**.

> You can't delete the **Main View** unless you have created at least one other view.

> **Why am I seeing this page / window?**
>
> This help page is often the **first help page** people see because it is associated with the Home screen and Dashboard, one of our most commonly used features. You can access help from any screen in Quicken by pressing the **F1** key  or by clicking on one of our circular question mark icons . People sometimes do this by accident and are surprised to find themselves on this page.

> **Note for our Canadian Customers**
>
> The following terms will be different in the Canadian releases of Quicken.
>
> Canada: "Cheque" / United States: "Check"
> Canada: "Colour" / United States: "Color"
> Canada: "Centre" / United States: "Center"
> Canada: "Realise" / United States: "Realize"
> Canada: "Behaviour" / United States: "Behavior"
> Canada: "Analyse" / United States: "Analyze"