How do I add, change, or remove a Quicken data file password?

To protect transactions in a Quicken data file from unauthorized changes, you can set up two kinds of passwords in Quicken:

Set a password for your data file

File passwords prevent unauthorized access to your Quicken data file. After you set up a file password, you need to enter the password to access any of the accounts added to the file. A file password doesn't protect it from being deleted, copied, or renamed. However, the file password remains valid for files that are copied or renamed.

1. Open the data file for which you want to set a password. Go to **File** > **Open Quicken File** and select the required file.
    - **What does a file password protect?**
      A file password protects the current data file only. Make sure that the current file is the one you want to protect with a password.
2. Choose **File** menu > **Set Password for this data file**. The **Manage Data File Password** window is displayed.
3. If you want to set a password for your data file, select the option Use my custom password.
    - **What are the password requirements?**
      You can type up to 16 characters, including spaces. Quicken is case sensitive. This means that if you specify aBc987, you must type aBc987 and not abc987 or ABC987.
4. Enter your custom password in the **Create New Password** and **Confirm Password** fields.
5. Click **OK**.
    - **What happens next?**
      After you create a new password for your data file, you need to enter this password everytime you want to open the file. If you cannot remember your password, Quicken offers a password removal service.
6. If you do not want to protect your data file with a password, select the option I do not want to use data file password.

Create a transaction password

Transaction passwords protect all transactions before a certain date. After you set up a transaction password, Quicken will prompt you for the password before you can record changes to any of the transactions dated on or before the date you specified. (You might use a transaction password when you close an accounting period so that no one accidentally changes transactions within that period.)

1. Choose **File** menu > **Open Quicken File** to open the data file that contains the transactions you want to protect with a password.
    - **What does a transaction password protect?**
      A transaction password protects only the transactions in a file before a specified date.
2. Choose **File** menu > **Set Password to modify transactions**.
3. In the **Password** field, type the password.
    - **What are the password requirements?**
      You can type up to 16 characters, including spaces. Quicken is case sensitive. This means that if you specify aBc987, you must type aBc987 and not abc987 or ABC987.
4. In the **Confirm Password** field, reenter the same password.
5. In the **Required For Dates Through** field, enter the date of the last transaction you want the password to apply to.
6. Click **OK**.
    - **What happens next?**
      From now on, Quicken prompts you for the password before you can record changes to any of the transactions dated on or before the date you specified. You can use this as a reminder not to change transactions for a specific accounting period by setting the date for the close of the accounting period.

      If you cannot remember your password, Quicken offers a password removal service.

Notes

- **Tips about deciding which type of password you need**
  File passwords protect an entire data file, that is, every account within the data file. Transaction passwords protect all the transactions in a file that occurred before a specified date.
- **Tips about choosing a secure password**
    - Choose passwords that are easy to remember but difficult to guess. Consider using the first letter of each word in a phrase and include a special symbol such as an exclamation mark or colon in the middle of the phrase (rather than at the beginning or end). Avoid using personal information such as nicknames, license numbers, Social Security numbers, and so on, as well as words that can be found in English or foreign language dictionaries.
    - Don't write down passwords.
    - Change passwords from time to time.
    - Don't share passwords.
- **Tips about changing a password**
  If a data file is already protected by a file password, Quicken displays an Old Password field. Type the current password in this field, and then type the new password in the New Password and Confirm Password fields.
- **Tips about removing a password**
  If a data file is already protected by a file password, Quicken displays an Old Password field. Type the current password in this field, and then make sure the New Password and Confirm Password fields are empty.
- **Tips if a password doesn't work**
  Additional troubleshooting information is available.
- **File passwords vs. Password Vault passwords**
  A file password protects an entire Quicken data file; a Password Vault password protects only the passwords stored within the Password Vault.

If you forget your data file password, follow these troubleshooting steps; if you forget your Password Vault password, Quicken cannot remove the password. You must delete and reset the Password Vault to use it again.

To further secure your Quicken data, we recommend that you create a User Password in Windows. To do so, choose Start menu > Control Panel > User Accounts.

Tell me more about how Quicken protects my financial information