

How do I archive Quicken information at year's end?



Quicken doesn't require or recommend that you archive or close out your data file at the end of the year. In fact, not archiving your data at the end of the year lets you run comparison reports on income and expenses from previous years. Year-end backups were a standard process back when floppy drives were a common backup device and their size limitations meant that it was best to store a year at a time. We still provide this functionality, but it is no longer necessary or encouraged.

To create a year-end archive:

1. [Open](#) the file you want to copy.
2. Choose **File** menu **Copy or Backup File**.
3. On the **Backup or Copy File** screen, under **Advanced Options**, select **Create a year-end archive**.

Backup or Copy File

Complete backup

☐ Create a complete backup
An exact copy of your file. It can be restored if anything goes wrong with your primary data file.

Advanced Options

☐ Create a copy or template
Select a date range to copy plus other, advanced options. Use as an archive or as template to start a new data file.

☒ Create a year-end archive
Create an archive of the previous year or trim your main file to single year.

What to choose?
If in doubt use the **Complete Backup** option.
This is the best choice for creating a restorable backup of your existing Quicken file.

? Cancel Next

4. Select **Next**. The **Year-end-copy** screen will appear.

Year-end-copy

Current File

☒ My current data file will remain unchanged.

☐ I only want transactions* in my current data file starting with this date:
1/1/2021

* Only reconciled, non-investment, non-transfer transactions will be removed. All other transactions prior to this date will remain.

Archive File

Where would you like to put your archive?
C:\Quicken DataCpy.QDF Browse...

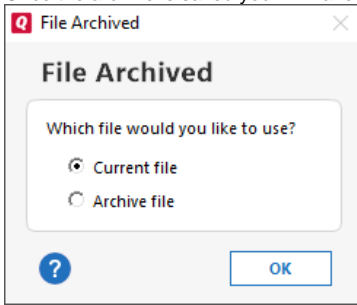
This archive will contain transactions up to and including:
12/31/2020

? Cancel Back Save Archive

Archive Files
Archive files are for your records and can be opened and viewed at any time.
Archives are disconnected from any connected services so no actions performed in the archive will impact your primary data file (downloads, sync, bill pay, credit score, etc. - you can reconnect these at any time.)
If you do not wish to have services in the archive disconnected consider making a Backup File instead.

5. Choose the option for your current file:
 - **My current data will remain unchanged.**
This option will make a backup of your previous year, but will not remove any transactions from your existing file.
 - **I only want transactions in my current file starting with this date.**
This option removes transactions older than the date you specify. The default is the first day of the current year. This is a good option to choose if you want to keep your file from getting too large.
6. Check the file address for **Where would you like to put your archive?** You can use **Browse** to select a new location.
7. Review the date for **This archive will contain transactions up to and including**. The default is the last day of the previous year. Adjust the date if you need to.
8. Select **Save Archive**.

9. Once the archive is saved you will have the option to use the **Current file** or the **Archive file**. Choose the one you want to use and select **OK**.



For more information about backups see: [Creating a partial/template file or year end backup](#)