Investing Quicken.com portfolio preferences

About customizing Quicken.com portfolio preferences

You can upload your investing account data to investing.quicken.com. This allows you to view your portfolio, including shares, from anywhere you have internet access.

1. Choose **Edit** menu > **Preferences**.
2. In the left pane, click Quicken.com portfolio.
3. In the right pane, select the settings you want to use.
   - **Select accounts to view online**
     Select the Quicken investment accounts you want to upload to your own password-protected space on investing.quicken.com, which you can check from any Web-connected computer.
   - **Send my Shares, or Send only my Symbols**
     To track only your portfolio value (holdings), select **Send my Shares**. To track just the current share prices of your portfolio (market price per share), select **Send only my Symbols**.
   - **Track my Watch List on Investing.Quicken.com**
     Select this option to include securities listed in your **Watch** list.
   - **Change my Investing.Quicken.com credentials at next One Step Update**
     The next time you do a **One Step Update** you will be asked to provide new investing.quicken.com login credentials. If you have never uploaded your investing account data to Investing.Quicken.com, this option is unavailable.
4. Click **OK** to save your changes.