How do I sync my Quicken desktop and mobile data?

When you sync, you transfer your Quicken data to and from your mobile devices.

Data moves in both directions—between your desktop and mobile device. Anywhere you have new data, Quicken figures out which device needs that data, and moves it where it needs to be. This includes additions and changes to the accounts you choose to sync, the transactions you download or enter manually, and the budget in your desktop software.

At the end of a sync everything will match: transactions, balances, and budget results, regardless of where you choose to view your data.

Note: For investing accounts, the accounts and their balances are synced. Investing transactions are not synced as of now.

There is no need to sync one mobile device with another mobile device—only your Quicken desktop software needs to be synced with your mobile device (s).

When you set up Quicken for mobile and web we take care of the first sync automatically. Afterwards, here's how to sync your data whenever you want:

1. Within your desktop software, click the **Mobile & Web** tab**.**
2. Click **Sync Now**.
3. If prompted, enter your password. Depending on how you've set things up, this may either be your Password Vault password, or your Quicken ID password.
    - **Tell me more about my Quicken ID**
      The Quicken ID is a universal access ID for online connected services and registration. With a Quicken ID, you can:
        - Download transactions directly from your bank into Quicken
        - Pay your bills online directly from Quicken
        - Use Quicken on Mobile and Web
        - Snap and store receipts on your phone and sync to Quicken desktop
        - Receive email and text alerts
        - Get notified in-product when a free update is available
        - Access Quicken Support & Quicken Community.

      You need your Quicken ID to access any Quicken connected service, such as the Quicken Cloud. The Quicken Cloud is a free subscription* service that connects and integrates your financial institutions, your computer, and your mobile devices so you can manage your money and make strong financial decisions anytime, anywhere.

Note

- Alternatively, if you use One Step Update, you can sync your desktop and mobile data as part of the update process.

Using the Quicken Web app

Follow these steps:

1. On your web brower, open app.quicken.com.
2. Sign in with the Quicken ID that you used to sync your data file from the desktop.
3. You can download the transactions from your financial institution directly to Quicken Web for banking accounts. Investment accounts will need to be downloaded to your desktop and synced to web.
4. You'll be able to get the latest market price for your securities directly on the Quicken web application.
5. You can sync more than one data file to your web application using the same Quicken ID. To see all of the Quicken files associated with your Quicken ID, in Quicken desktop, click **Edit > Preferences > Cloud Accounts** and click Cloud accounts associated with this Quicken ID.