Add an account

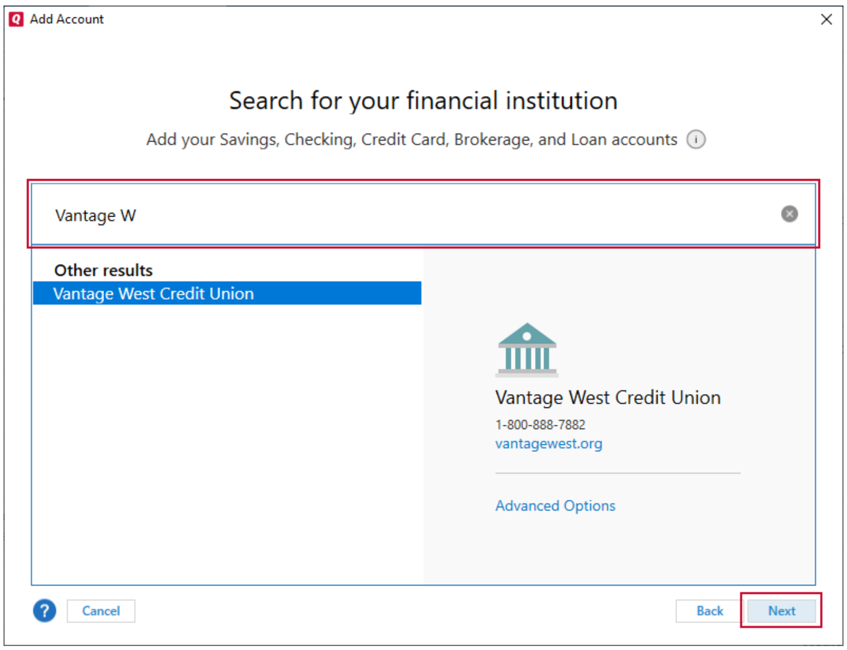
To use Quicken you must start by adding your financial accounts. It's easy to add the accounts you want to track in Quicken. The more accounts you add the more closely Quicken reflects your true financial situation, which can assist you in short- and long-term financial planning.

Add an online account

With online accounts, you download your transactions directly from the financial institution. If you do prefer to enter your transactions manually, see **Add an offline spending accoun**t below.

1. Select the **Add Account**  icon on the top right of the Account Bar.
   

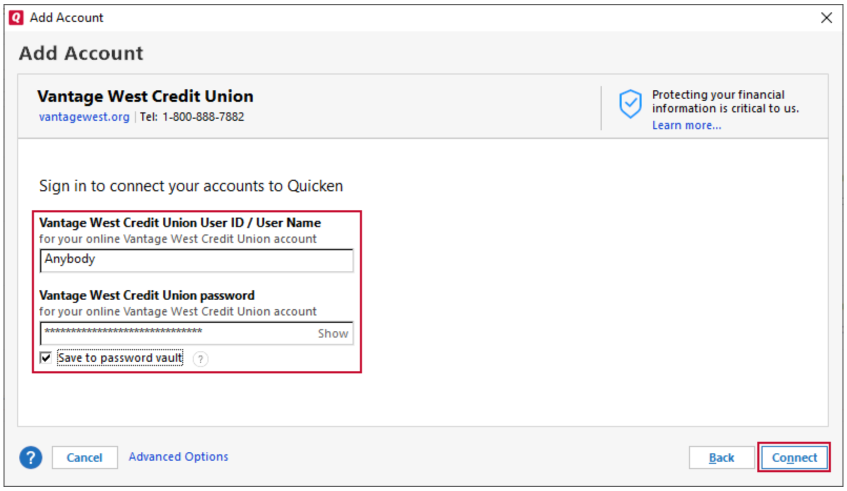
   You can also add a new account by selecting **Tools Add Account** from the top menu.
2. Start typing the name of your financial institution, **such as your bank or credit card provider.** Quicken will filter the results based on what you type. When you see your financial institution in the panel below, select it and click **Next**.

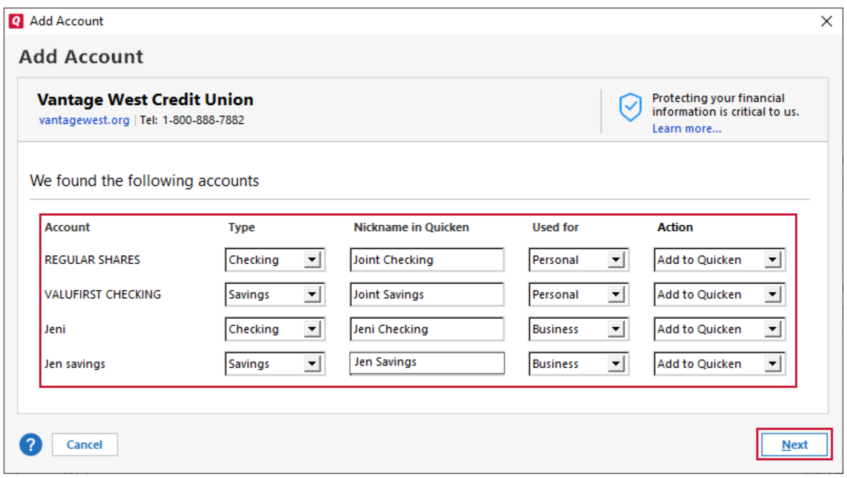
   > For online accounts, Quicken finds accounts based on the financial institution. This way, if you have multiple accounts at the same bank, you can add them all at once. You will have a chance to select the type of account later.

   > If you cannot find your financial institution, go to their website or call them to see if they provide instructions for working with Quicken. You can also contact our customer support. While Quicken works with over 14,000 financial institutions, there are some financial institutions that may not be available. In those cases, see our instructions for adding an offline spending account below.

3. Enter your account/user information. This is the information you use to sign in to your online account, such as a user name and password. you may be asked for additional information, such as a challenge question or a code that is sent to your email or phone.



4. Review your accounts. Quicken will find all the accounts associated with your login. On this screen, you can make any adjustments, then click **Next**.
    - **Type**: Your options will vary according to the financial institution but **Checking** and **Savings** are the standard types.
    - **Nickname**: Enter any name that helps you easily identify the account.
    - **Used for**: Most accounts will be **Personal**, but depending on your versions you may have the option of **Business** and **Rental**.
    - **Action**: Select **Add to Quicken** if you want to add an account.



5. Quicken now adds your accounts. You'll see a message letting you know what accounts were added. You can choose to either **Add Another Account** or **Finish**.

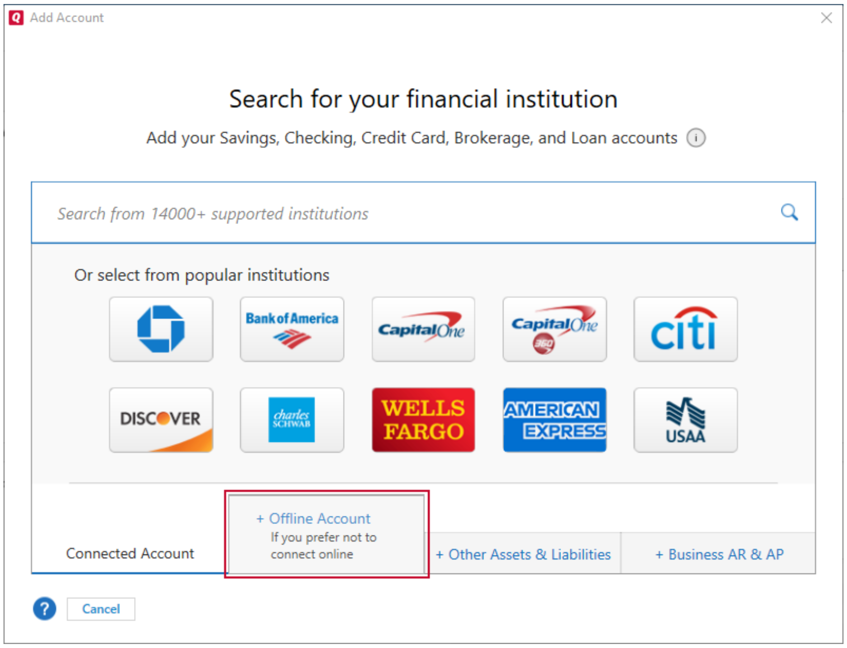
Add an offline account

Offline accounts (sometimes called manual accounts) don't connect to a financial institution. It is your responsibility to enter all the information and track your transactions accurately. In most cases, it is preferable to use an online account, but you may choose this for security, control, or because the account is not with an institution Quicken can connect to.

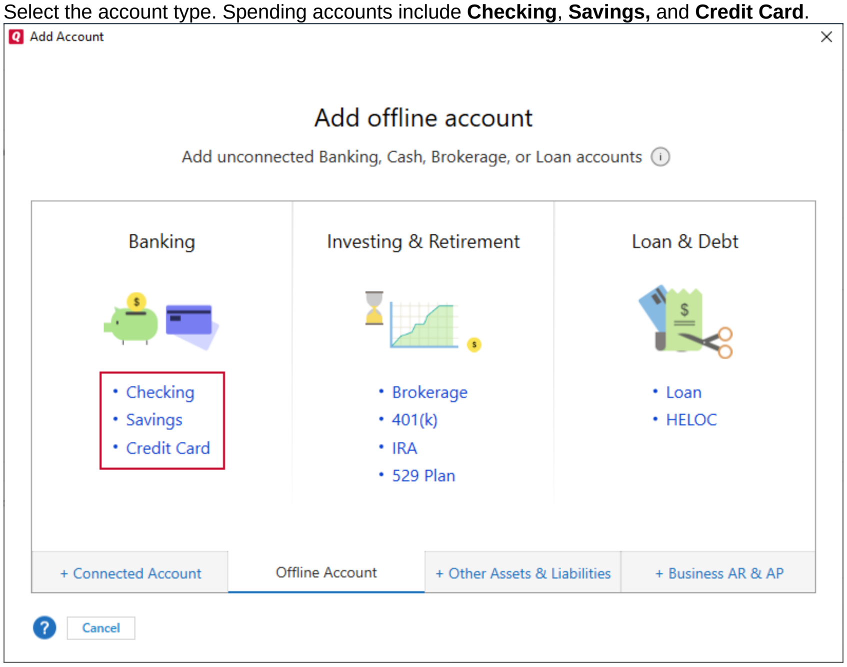
1. Select the **Add Account**  icon on the top right of the Account Bar.

You can also add a new account by selecting **Tools** **Add Account** from the top menu.

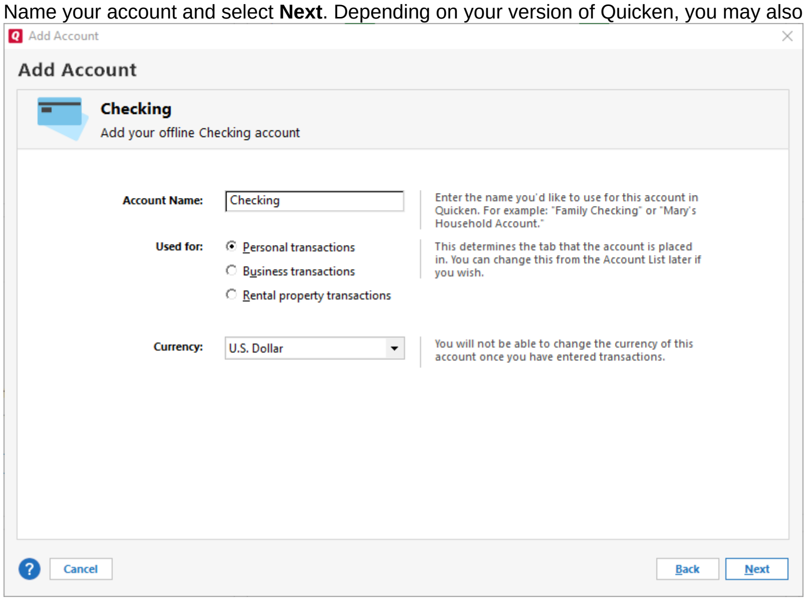
2. Select **Offline Account**.



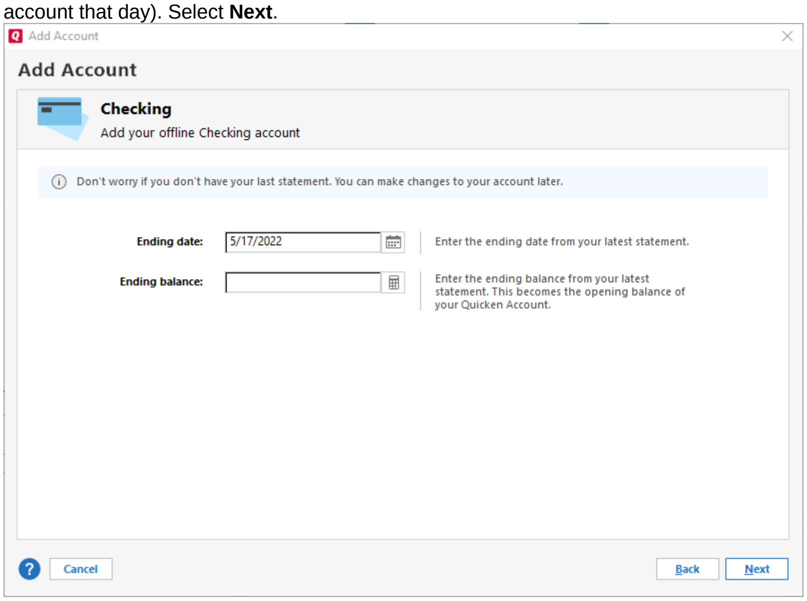
3. Select the account type. Spending accounts include **Checking**, **Savings,** and **Credit Card**.



4. Name your account and select **Next**. Depending on your version of Quicken, you may also have options for selecting how your account is used.



5. Enter your **Statement ending date** (The date you want to start tracking from) and your **Statement ending balance** (how much was in your account that day). Select **Next**.



6. Your account will be added. Select **Finish**. You can also choose to **Add Another Account**.