

How do I add a spending account (checking, savings, or credit card)?

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

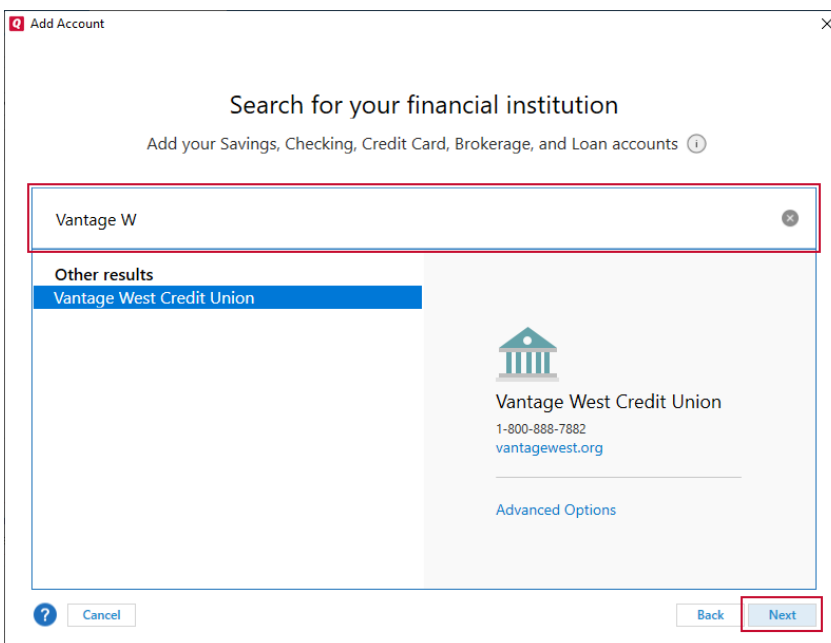
With online accounts, you download your transactions directly from the financial institution. If you do prefer to enter your transactions manually, see **Add an offline spending account** below.


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.

Add Account

Vantage West Credit Union
vantagewest.org | Tel: 1-800-888-7882

Protecting your financial information is critical to us.
[Learn more...](#)

Sign in to connect your accounts to Quicken

Vantage West Credit Union User ID / User Name
for your online Vantage West Credit Union account
Anybody

Vantage West Credit Union password
for your online Vantage West Credit Union account
***** Show

☒ Save to password vault (?)

Cancel Advanced Options Back **Connect**

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.

Add Account

Vantage West Credit Union
vantagewest.org | Tel: 1-800-888-7882

Protecting your financial information is critical to us.
[Learn more...](#)

We found the following accounts

Account	Type	Nickname in Quicken	Used for	Action
REGULAR SHARES	Checking	Joint Checking	Personal	Add to Quicken
VALUFIRST CHECKING	Savings	Joint Savings	Personal	Add to Quicken
Jeni	Checking	Jeni Checking	Business	Add to Quicken
Jen savings	Savings	Jen Savings	Business	Add to Quicken

Cancel Next

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**.











Add Account

Search for your financial institution

Add your Savings, Checking, Credit Card, Brokerage, and Loan accounts ⓘ

Search from 14000+ supported institutions

Or select from popular institutions



Connected Account

+ Offline Account

If you prefer not to connect online

+ Other Assets & Liabilities

+ Business AR & AP

?

Cancel


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

Add Account

Add offline account

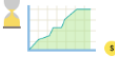
Add unconnected Banking, Cash, Brokerage, or Loan accounts ⓘ

Banking




- Checking
- Savings
- Credit Card

Investing & Retirement



- Brokerage
- 401(k)
- IRA
- 529 Plan

Loan & Debt



- Loan
- HELOC

+ Connected Account

Offline Account

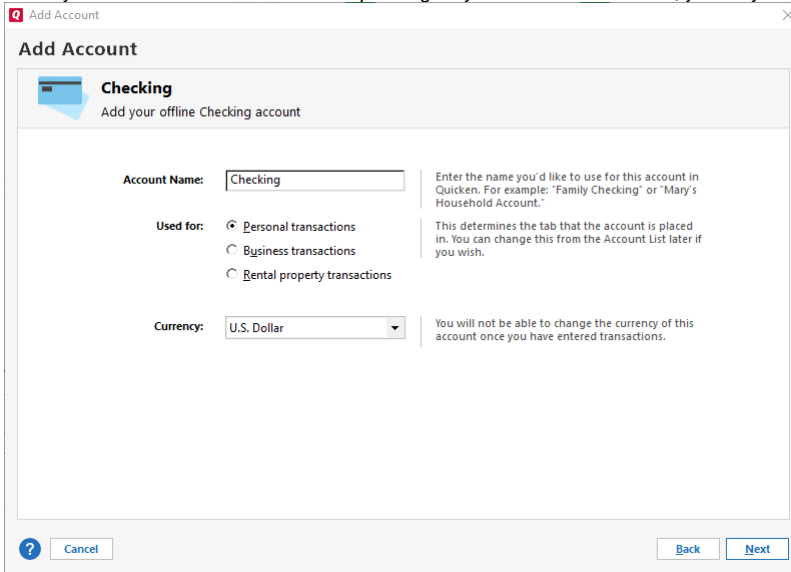
+ Other Assets & Liabilities

+ Business AR & AP

?

Cancel

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.



Add Account

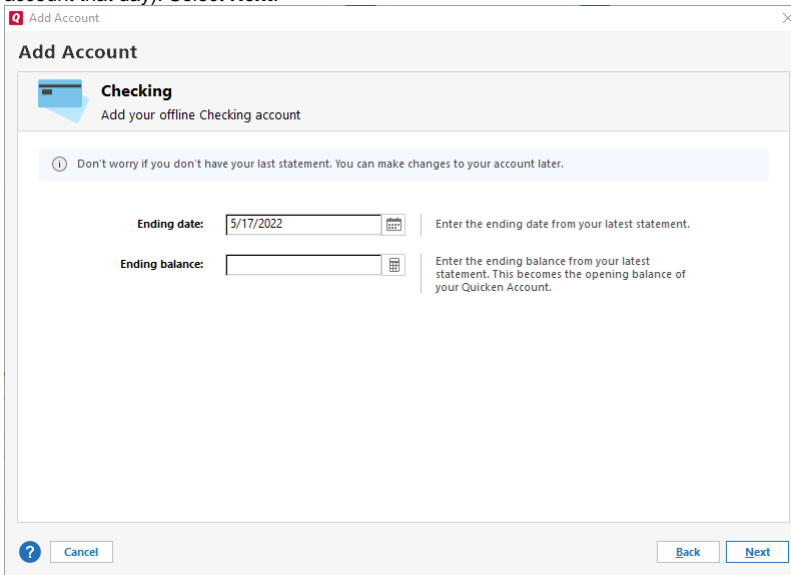
Checking
Add your offline Checking account

Account Name: Enter the name you'd like to use for this account in Quicken. For example: "Family Checking" or "Mary's Household Account."

Used for: ☒ Personal transactions ☐ Business transactions ☐ Rental property transactions This determines the tab that the account is placed in. You can change this from the Account List later if you wish.

Currency: You will not be able to change the currency of this account once you have entered transactions.

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**.



Add Account

Checking
Add your offline Checking account


Don't worry if you don't have your last statement. You can make changes to your account later.

Ending date: Enter the ending date from your latest statement.

Ending balance: Enter the ending balance from your latest statement. This becomes the opening balance of your Quicken Account.

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

Adding a cash or asset account

1. Select **Add Account**  on the top right of the **Account Bar**.
2. Select the **Other Assets & Liabilities** tab at the bottom of the **Add Account** screen.
3. Select the account type you want to add.
4. Follow the remaining steps in the **Set Up Wizard**.

Which connection method should be used?

The following options are not available for every account. The connection methods you see in the wizard will be customized to your financial institution and the account you are setting up.

Express Web Connect (Free)

Express Web Connect provides an integrated way to update transactions and account balances for financial institutions that do not currently connect directly to Quicken. With Express Web Connect, you can use One Step Update to update multiple accounts, and you no longer have to go to a financial institution's website to retrieve transactions.

Direct Connect (Fees may apply)

Direct Connect is a service some banks use to connect to Quicken. You will know if you have Direct Connect if you specifically signed up for it and/or your bank sent you a special user ID and password to use with Quicken. Some financial institutions require Direct Connect to use services such as bill pay, or transfers via Quicken.

Web Connect (Free)

Many financial institutions offering Web banking also let you download your Web transactions into Quicken. If you already have a password, and if the website displays the Quicken logo or a button or link that says Download to Quicken, this means that your financial institution supports the Web Connect protocol for downloading and importing transactions into Quicken.