Things to do before converting your data

This topic explains in detail what do you need to know and do before you convert your data to Quicken.
Before starting the conversion, you must learn what data can be carried over to Quicken from other versions of Quicken or from other personal finance applications.
The tasks you need to do before converting depends on the application you are migrating from:

If you are converting from Quicken Essentials for Mac, you can perform these tasks to improve the import of your data, but they're not required. NOTE: Quicken Essentials doesn't run on MacOS Sierra v10.12 so if you are running that OS, the following won't be possible:

Prepare the existing Quicken Essentials data file

1. Open your Quicken Essentials application.
2. Manually update all of your accounts with the latest transactions.
3. Fix all transaction-related issues such as duplicate or missing transactions.
4. Remove your data file password.
5. Exit Quicken Essentials.

Note: After preparing your data file, check your online and Quicken account balances. Ensure that you note down the balances, so that you can verify later in Quicken.

Import the Quicken Essentials data file file into Quicken

For details, go to the Getting Started topic.
If you are converting from Quicken Mac 2007, you need to perform the these tasks:

Prepare the existing Quicken 2007 data file

1. Open your Quicken Mac 2007 application.
2. Update all your accounts and download the latest transactions.
3. Fix all transaction-related issues such as duplicate or missing transactions.
4. Remove your data file password.
5. Accept all downloaded transactions.
6. Cancel all repeating and pending online payments.
7. Exit Quicken Mac 2007.

Note: After preparing your data file, check your online and Quicken account balances. Ensure that you note down the balances, so that you can verify later in Quicken.

Import the Quicken Mac 2007 data file into Quicken

For details, go to the Getting Started topic.
If you are converting from Quicken Windows 2010 or higher, you need to perform these tasks:

Prepare the existing Quicken for Windows data file

1. In Quicken Windows, open your data file.
2. Update all your accounts and download the latest transactions.
3. Fix all transaction-related issues such as duplicate or missing transactions.
4. Remove your data file and transactions passwords.
5. Ensure that there are no hidden accounts.
6. Ensure that the account names and category names are not more than 15 characters long.
7. Ensure that the security names do not contain any special characters, and the ticker symbols are in upper case.
8. Accept all downloaded transactions.
9. Cancel all repeating and pending online payments.
10. Quit the Quicken Windows application.

Note: After preparing your data file, check your online and Quicken account balances. Ensure that you note the balances, so that you can verify later in Quicken.

Transfer the .QXF file to your Mac

Transfer the .QXF file to your Mac machine using your network, USB drive, a CD or via email.

Import the .QXF file into Quicken

For details, go to the Getting started topic.
Quicken supports data import from other applications such as Banktivity and Moneydance.
Details are explained in the topics about Banktivity import and Moneydance import.