

Getting started with Quicken

Thank you for choosing Quicken

This guide helps you get started with Quicken as quickly as possible.

You'll find out how to:

- Use the Home tab
- Set up your first account
- Accept your transactions
- Update your accounts
- Take a tour of Quicken
- Categorize your transactions
- Get more out of Quicken
- Get help when you need it

Use the Home tab

The **Home tab** is a dashboard where you can track your finances and stay on top of your bills.

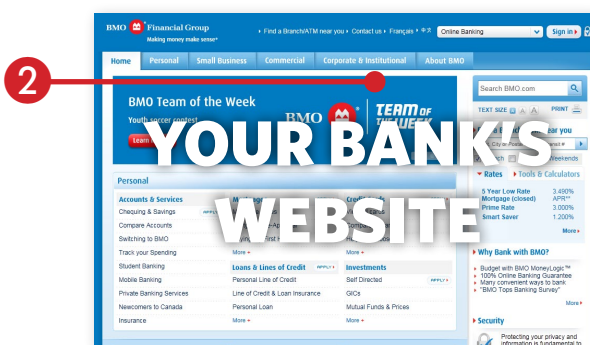
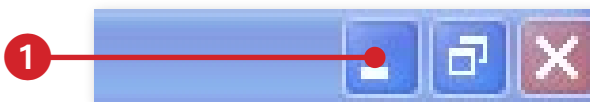
The screenshot shows the Quicken Home tab dashboard with the following sections:

- Home** (selected), Spending, Bills, Planning, Property & Debt, Business
- Main View** (selected), Add View
- Customize** button
- 1 See Where Your Money Goes**
 - Get a picture of how much you're spending in various areas of your life.
 - Why do this?** Knowing where you spend your money is an important first step in taking control of your finances.
 - What's needed?** Your user IDs and passwords for your online bank account and your online credit card account.
 - 10 MINUTES to complete**
 - [Get Started](#) button
- 2 Stay On Top of Monthly Bills**
 - Eliminate late fees and overdraft charges with an accurate picture of where your bank balance stands.
 - 5 MINUTES to complete**
- 3 Budget Your Spending**
 - Automatically create a budget to track your top spending areas.
 - 5 MINUTES to complete**

Set up your first account

Follow these simple instructions and you will be up-and-running with Quicken in less than 10 minutes.

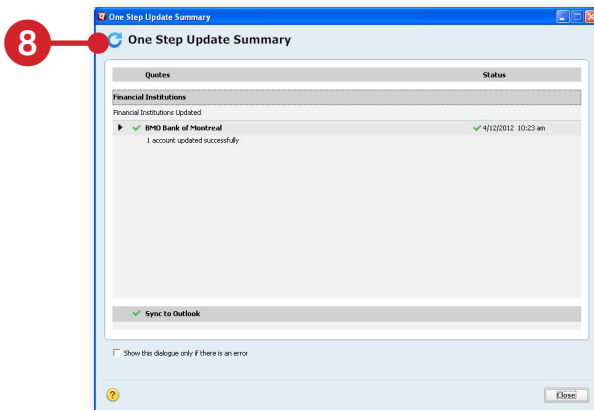
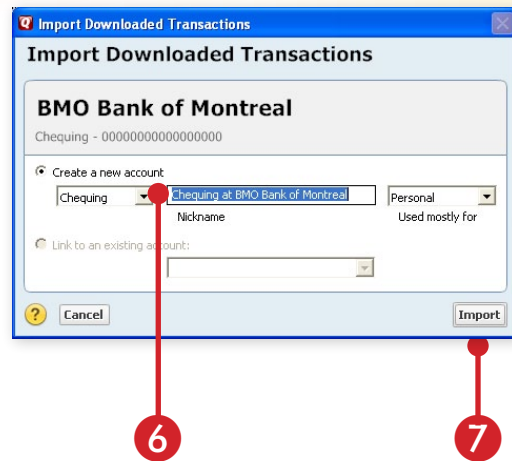
1. Minimize **Quicken** if it is open. If it is closed go directly to step 2.
2. Open your web browser and navigate to your **bank web site**.
3. Sign in to your **bank web site**.
4. Follow the procedures to select and download your primary bank account.
5. Choose **Open**.
6. **Quicken** will open or maximize automatically.



6. **Quicken** will offer to create the account for you.

Note: You can change the name of the account. The name must be **unique** within Quicken.

7. Click the **Import** button to create and import the transactions.
8. The **One Step Update Summary** window will confirm that the account was updated.

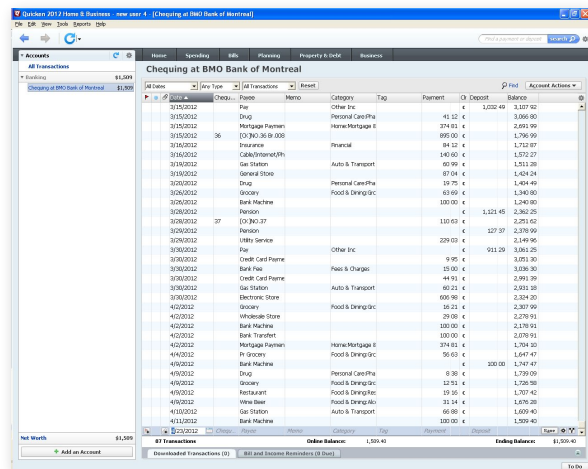
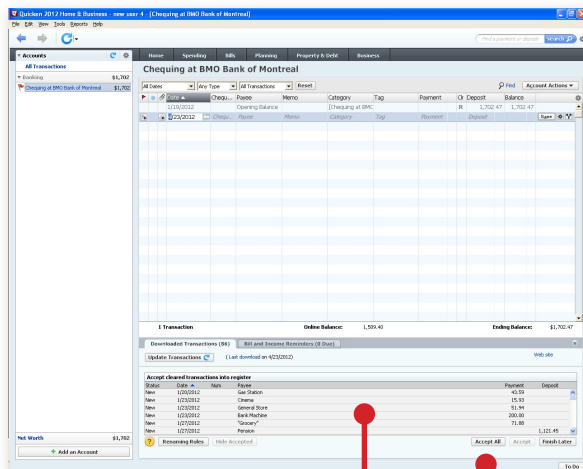


Accept your transactions

1. When you look at your account you will notice that the downloaded transactions will appear at the bottom of the window.
2. Since this is a new account, click the **Accept All** button to move them to the account register.

There you go!

Your first account was created in Quicken.



Take a tour of Quicken

Quicken is designed to make your day-to-day tasks as easy as possible. Here is a quick introduction to the controls you will use most often.

Click the **Account List** icon to edit your account names and make other changes.

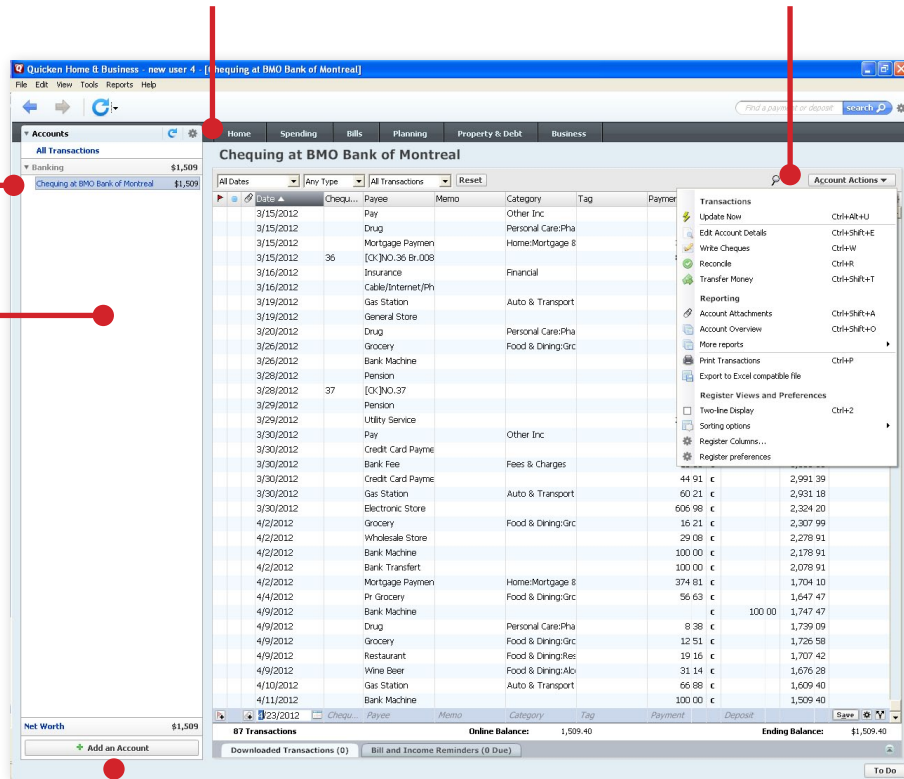
Click the **tabs** to access tools and features organized around common financial activities. Click **Account Actions** for a menu of tasks, preferences, and reports related to the account you are working with.

Click an **account name** in the Account Bar to open its register.

The **Account Bar** is a list of the accounts you've added to Quicken.

A **register** is a list of transactions within an account.

Click a **transaction** in a register to make changes, or click a blank line to enter a new transaction.



Click **Add an Account** to set up more accounts.

Update your accounts

To keep your account information up to date, go to your bank web site and download your latest information.



Categorize your transactions

Categorizing your transactions lets you see where you're spending your money. The good news is that Quicken does most of this work automatically for you!

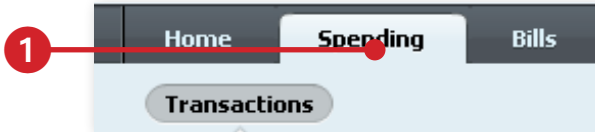
Quicken assigns categories to your transactions when it downloads them from your bank. For example, if you used your bank card at Sobey's, Quicken knows that Sobey's is a grocery store and it automatically assigns the category *Food & Dining:Groceries* to the transaction.

In most cases, Quicken can accurately guess the category. In some cases, however, it won't recognize the transaction the first time it sees it — for example, your rent cheque. Quicken also might assign a category to a transaction that you don't want — for example, during that trip to Sobey's you may have bought pet food, which you want to track under the category *Pets:Pet Food & Supplies* instead of *Food & Dining:Groceries*. Naturally, you'll want to assign the correct categories to your transactions. Here's how...

Use the spending tab to categorize transactions

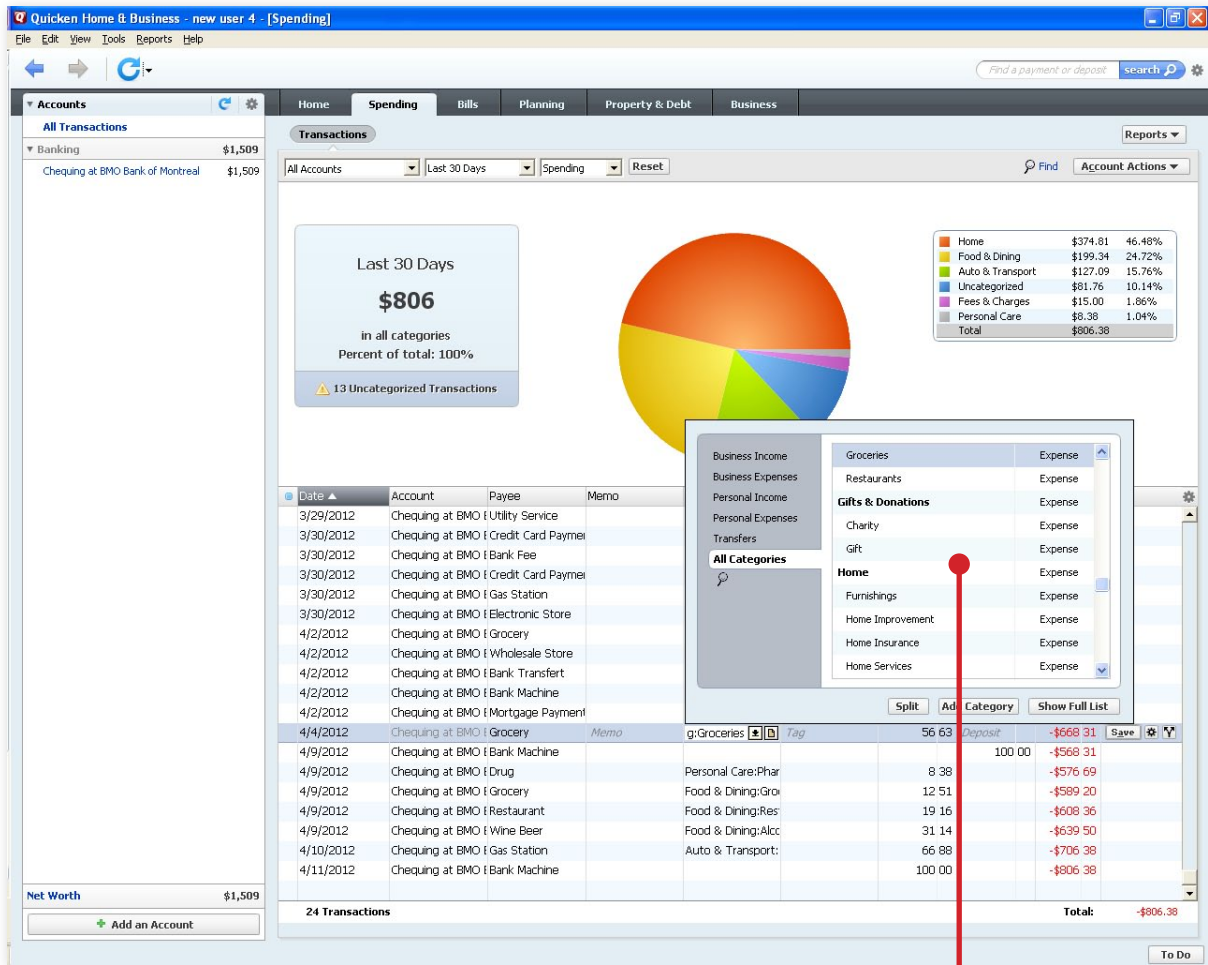
The steps below use the **Spending** tab to assign a category to a transaction. The process is identical if you use a Quicken account register. However, a key advantage of using the Spending tab is that it alerts you if you have any uncategorized transactions.

1. Click the **Spending** tab. The Spending tab shows you the transactions from your spending accounts. It also has a cool pie chart that shows you where your money is going.
2. Click the transaction that you want to change the category for.



A screenshot of the Quicken Home & Business software interface. The 'Spending' tab is active. On the left, the 'Accounts' pane shows 'Banking' with a balance of \$1,509 and 'Checking at BMO Bank of Montreal' with a balance of \$1,509. The main area features a 'Last 30 Days' summary box showing a total of \$806 in all categories, with 13 uncategorized transactions. A pie chart displays the distribution of spending across categories: Home (46.48%), Food & Dining (24.72%), Auto & Transport (15.76%), Uncategorized (10.14%), Fees & Charges (1.86%), and Personal Care (1.04%). Below the pie chart is a table of transactions for the last 30 days, with columns for Date, Account, Payee, Memo, Category, Tag, Payment, Deposit, and Total. A red circle with the number '2' is positioned below the table, with a red line pointing to the transaction dated 4/4/2012 for 'Chequing at BMO | Pr Grocery'.

3. Click the **button** next to the category you want to change.



4. Click the **category** you want from the list.

If the category you want isn't in the list, click the **Add Category** button.

Get more out of Quicken

When you start to feel more comfortable with Quicken, here are some things you might want to check out.

Manage your investments: You can add brokerage accounts to Quicken and track your investment performance from within the Investments tab. (Quicken Home & Business only)

Track your business: If you own a business, you can track your income and expenses and performance. (Quicken Home & Business only)

Report on your finances: Take a look at the reports and graphs in Quicken. You'll find reports like Income vs. Expense and Spending by Category - both very helpful when you're trying to figure out where you stand. Choose Reports menu > Reports & Graphs Center.

Add your paycheck: The Paycheque Setup wizard helps you enter all the income and deductions listed on your paycheck. Quicken uses this information in tax-related planners and calculators. Click the Planning tab, click the Tax Center button, and then click Add Paycheque. (Some features only available in Quicken Home & Business version)

Use the All Transactions register: The All Transactions register lets you review and work with transactions from all your spending, asset, and liability accounts in one place. This helps you easily identify uncategorized transactions, and edit your transactions in one place.

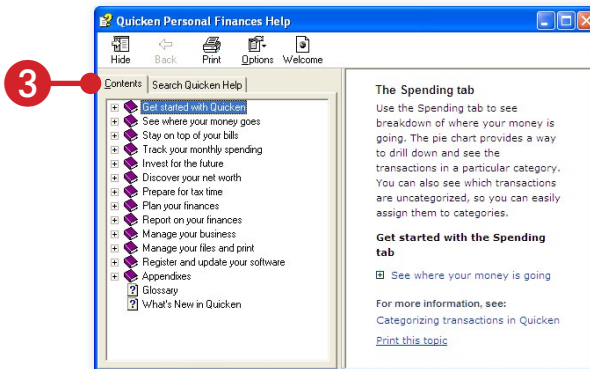
Get help when you need it

We want to make sure you get the help you need. If, after reading this guide, you have questions, you can turn to the following resources.

Quicken Help

1. Click the **Help** menu.
2. Select **Quicken Help** or click the **F1** key.
3. Then select the **Contents** tab.

The contents area lets you refer to specific “chapters” about the various areas that Quicken Home & Business covers.



Note: Quicken Cash Manager has the same help file but does not provide all the listed features.

Quicken Live Community

An online forum where you can get answers from other Quicken users and experts.

This online community is hosted by the US since the number of US users is much larger than Canadian users. You can also access Live Community at glc.intuit.com

Quicken Support

If you need help, contact Support at www.quicken.ca/support

Thank you again!

We hope this short guide gets you up and running with Quicken. We appreciate your business and work hard every day to make Quicken the best personal finance solution on the market.

The Quicken Team