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
- Take a tour of Quicken
- Update your accounts
- Categorize your transactions
- Set up your bills and income
- Create a budget
- Use Quicken on your phone
- 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 Get Started button takes you to wizards that help you get set up.
Set up your first account

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

1. Click the **Home tab** at the top of the Quicken window.

2. Click **Get Started** in the See Where Your Money Goes section.

3. **Enter or choose the name of your bank.**

   This is the bank where your primary checking account is located.

   Your primary checking account is the one you deposit your paycheck into and pay your bills out of.
Set up your first account

4. **Enter your bank login information.**

   For most people this is the same login they use for their bank’s website.

5. **Click Connect.**

   Quicken begins a conversation with your bank to discover what accounts you have. This can take about a minute to complete.

6. **Set preferences for your Quicken accounts.**

   Skip this step if you don’t see this screen.

   If you feel like it, give nicknames to your accounts. These names will be used in the Quicken interface and reports.

   If there are accounts you don’t want to add to Quicken, select Ignore instead of Add.
Set up your first account

7. **Quicken creates your accounts and downloads your transactions...**

Congratulations!
If you’ve been following along, you’ve just added your first Quicken accounts!

If you want to set up more accounts, click **Add another account**.
If you don’t, no problem; you can always add more accounts later.

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 icon to download new transactions.
- 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 the icon to open the Account List, where you can edit your account names and make other changes.
- Click the **tabs** to access tools and features organized around common financial activities.
- Click the **Account Actions** icon for a menu of tasks, preferences, and reports related to the account you are working with.
- Click **Add an Account** to set up more accounts.
- Click **Help** to connect with other Quicken users in our Live Community forum.
Update your accounts

Now that you’ve set up an account, you’ll want to keep it up-to-date. To display and update your Quicken accounts:

1. Click the One Step Update icon. (Or choose Tools menu > One Step Update.)

2. Enter the account password.

   Tip: If you want Quicken to remember the password, click Manage My Passwords.

3. Click Update Now.

   Quicken downloads any new transactions and updates your account balance.

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 ATM card at Kroger, Quicken knows that Kroger 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 check. Quicken also might assign a category to a transaction that you don’t want -- for example, during that trip to Kroger 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. Nice!

8. 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.

9. Click the transaction that you want to change the category for.

10. Click the button next to the category you want to change.

11. Click the category you want from the list. If you don’t see it at first, just start typing its name and Quicken will find it.

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

Set up your bills and income
OK. So now you have a one or two accounts set up in Quicken and you can download transactions and use categories to see where your money is going. What’s next? What more could there be? Beyond tracking your spending, Quicken actually makes it easier to spend your money. And we mean that in a good way!

If you’re like most people, you have pretty much the same bills every month and you get paid on a regular schedule. If you tell Quicken what your bills are, and when you expect income, it can remind you when your bills are due, and project your account balances into the future. This will help you avoid late fees and overdraft charges, and perhaps put some of that “extra money” you might have into your savings account. Imagine that! Here’s how...

12. Click the **Home tab**.

13. Click **Get Started** in the **Stay on Top of Monthly Bills** section.

14. Click **Add a bill** to tell Quicken about any bills it doesn’t know about yet.

   Click **Edit** to change the details of a bill, such as when it’s due, the amount, etc. Click **Next** and tell Quicken about your paycheck and other income you may have.

15. **When you’ve finished,** The **Stay on Top Monthly Bills** section on the Home tab lists your upcoming bills and any income for the selected date range. **Tip:** Click **Options** to change the time period displayed.

**Create a budget**
If you’ve been following along and setting up Quicken as you work through this guide, you now know where your money is going, and where you stand regarding your upcoming bills and income. Knowing these critical facts about your finances sets the stage for the next huge benefit of Quicken: keeping your spending in line with your income. And relax, you don’t need to track each and every penny; tracking just a few critical spending categories is usually enough to keep your expenses under control.

How does Quicken do it? This will sound familiar: a section on the Home tab makes it easy to see if you’re coming in under your target or if you’re in danger of blowing your budget.

1. Click the **Home tab**.

   ![Home tab](image)

2. Click **Get Started**, in the **Budget Your Spending** section.

   ![Get Started](image)

3. **Enter a name** for your budget and then **OK**.

   ![Create a New Budget](image)

   Quicken creates a budget for your recurring personal expense categories.

4. **When you’ve finished**, the **Budget Your Spending** section on the Home tab shows you how you’re doing with your overall spending.

   ![Budget Your Spending](image)

   **Use Quicken on your phone or tablet**
Quicken on your mobile device (iPhone, iPad, Android phone or tablet) syncs with your desktop data and makes keeping track of your money super easy while on-the-go. You can also receive various alerts and notifications regarding your account balances, fees, and spending patterns. All of which are completely customizable, of course! Here’s how to get started:

1. Click the **Mobile & Alerts** tab.

2. Click **Create Your Quicken Cloud ID**.

We’ll lead you through the simple set up process and downloading the Quicken app for your mobile devices. After that, syncing is easy. Just click once and your Quicken desktop data will appear on all of your synced mobile devices, and the transactions you’ve entered on your mobile device will appear on your desktop. How cool is that?

We hope you’ll love this new feature!
Get more out of Quicken

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

• **Pay your bills online:** You can set up Quicken to pay your bills online without needing to go to your bank’s website. For more information, in the Quicken Help Contents, choose Stay on top of your bills > Personal bills, expenses, & income > Paying bills online.

• **Manage your investments:** You can add brokerage accounts to Quicken and track your investment performance from within the Investments tab. (Quicken Premier, Quicken Home & Business, and Rental Property Manager only.)

• **Track your business:** If you own a business, you can track your income and expenses and performance. (Quicken Home & Business and Rental Property Manager only.) If you have a rental business, you can keep track of your properties. (Rental Property Manager only.)

• **Plan for tax time:** The Tax Center in the Planning tab helps you keep track of information you’ll need for tax time.

• **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 Paycheck 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 Paycheck.

• **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.

• **Set your preferences:** You can configure Quicken so that it works the way you do. Choose Edit menu > Preferences.
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.

<table>
<thead>
<tr>
<th>Quicken Help</th>
<th>Quicken Live Community</th>
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<tbody>
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<td>Includes explanations about how features work and steps on how to do most tasks. From the Help menu, choose Quicken Help.</td>
<td>An online forum where you can get answers from other Quicken users and experts. Click the Help button in the lower right of Quicken. You can also access Live Community at qlc.intuit.com</td>
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<td>If you run into a bug or other malfunction in Quicken, contact Support at quicken.com/support</td>
<td>Offers a more thorough intro to Quicken and all of its features. Available at many bookstores and online.</td>
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Thank you again!

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

The Quicken Team