

# 3

## Using Quicken Home Page Features

---

### Introduction

Whether you've been following along so far with installing and setting up Quicken or you've already been exploring other chapters and features, this chapter brings it all home—to the Quicken Home page, that is. The Quicken Home page is a central location for all your account information, where you can access, organize, and update account information; view a big picture of your financial health and well-being; and explore your net worth.

The account bar, which appears alongside the home page, provides quick access to all your accounts and is divided into activity centers that categorize your accounts in logical groups. You can use the centers to access each of your accounts.

In this chapter, you will learn how to record and manage your account transactions and how to automatically update account information using online updates. You'll also find helpful information on Quicken Tips and Quicken Services, which provide you with additional tools and advice to help you manage your finances. In addition, you'll be privy to some keyboard shortcuts that will have you tooling around Quicken like a pro in no time.

### What You'll Do

**Use the Account Bar and Activity Centers**

**Get the Big Picture**

**Select Accounts to Include in Your Net Worth**

**Use Projected Cash Flow**

**Use Scheduled Bills & Deposits**

**Use Online Updates**

# Using the Account Bar

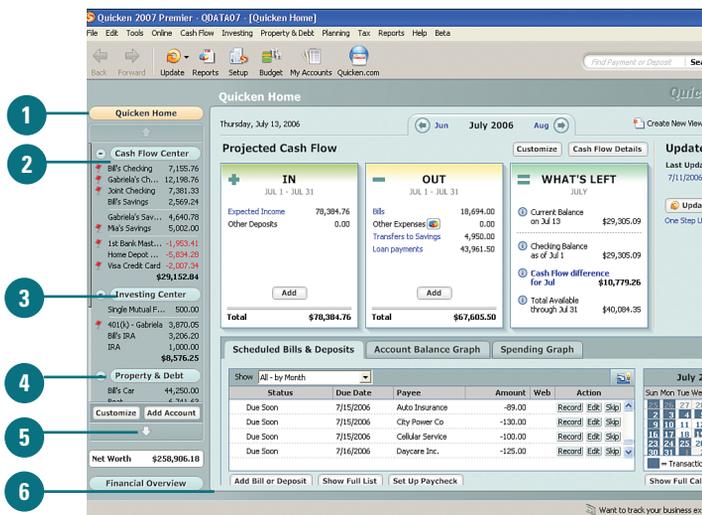
## See Also

See "Setting Quicken Preferences" on page 40 for more information on changing the position of the activity centers. See Chapters 4 through 6 for more information on using the different activity centers.

## Navigate the Account Bar

- 1 If you're in another area of Quicken and want to return to the Home page, click **Quicken Home**.
- 2 To access your bank and credit card account information, click **Cash Flow Center**. You can also click an account name to go directly to the register for that account.
- 3 To access your investments, securities, or retirement account(s), click **Investing Center**.
- 4 To view property and debt accounts, such as your home, car, property loans, and so on, click **Property & Debt**.
- 5 Click the arrows at the bottom or top of the activity center to scroll down or up. The arrows appear lighter when there is information hiding and darker when there is no information hiding.
- 6 To change the width of the account bar, hover your mouse over the border between the account bar and the Home page until you see the double arrows. Then click, hold down your left mouse button, and drag to the right to expand it or drag to the left to reduce it.

The account bar contains the activity centers and is located on the left side of the home page (unless you changed the position or removed it in Chapter 2, "Learning Quicken Basics," when we covered setting Quicken preferences). The activity centers include the Cash Flow Center, which contains all your banking and credit card accounts; the Investing Center, which contains all your investment and retirement information; and the Property & Debt center, which contains account information for your property, assets, and liabilities. Each of these centers provides access to all your accounts, where you can review, change, and remove account information. The following task provides an overview of the activity centers and shows you how to quickly access your accounts and customize the account bar. We'll get into more of the specifics of using each activity center in Chapters 4, "Managing Your Accounts," through 6, "Managing Your Bills and Transactions."



## Did You Know?

**You can also access account centers from the menus.** All the account centers are accessible from the Cash Flow, Investing, and Property & Debt menus.

## See Also

See "Setting Quicken Preferences" on page 40 for information on changing the position of the account bar.

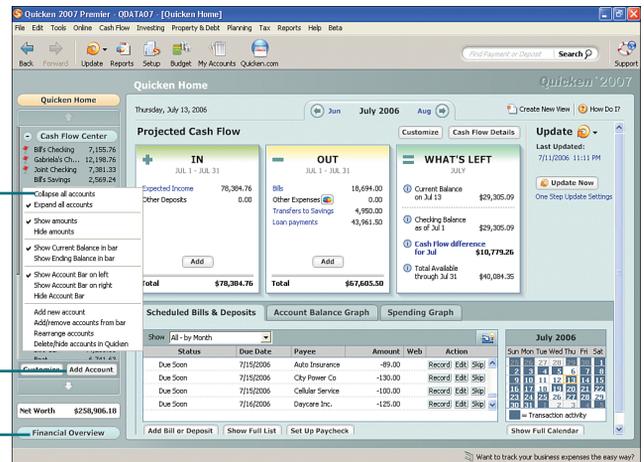
## Use the Activity Center

- 1 Right-click in any area of the account bar to view a menu of actions you can perform. For example, you can hide the account bar completely, move it, or choose to view more or less information about each account.
- 2 Create new accounts by clicking the **Add Account** button.
- 3 Your total net worth appears at the bottom of the account bar. To view a detailed breakdown of your net worth, click **Financial Overview**.

**TIMESAVER** *If there is a red flag next to one of your accounts, you can hover your mouse pointer (point, but don't click) over the account name to view the special message. Balances that appear in red and negative balances represent debt. Use the flags to help you keep up with your accounts. In the time it takes to take a quick glance at the activity bar, you'll know which accounts need your attention. This saves you the time and the effort of going into each account to review it.*

### See Also

For more information on the Financial Overview center, see "Getting the Big Picture" on page 61.



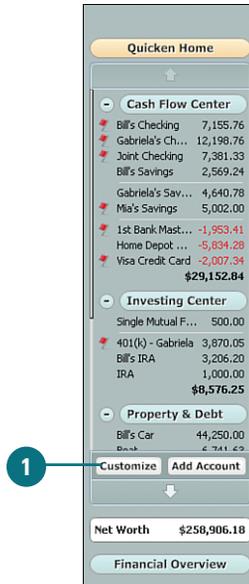
## For Your Information

**You can view a hidden account bar.** If an account bar is hidden, a double-arrow (>>) appears in the upper-left corner of the Quicken window. Click it to view the hidden account bar.

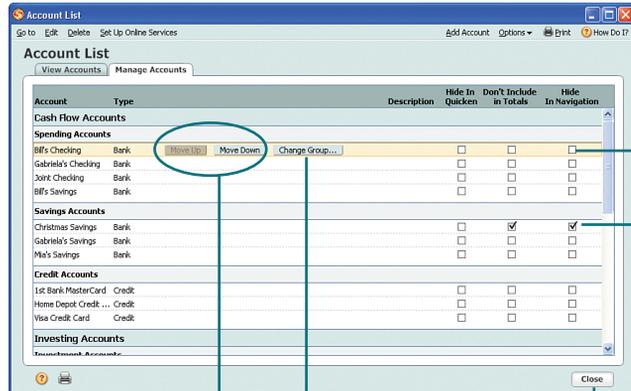
3

## Add or Remove Accounts on the Account Bar

- 1 To change the accounts that appear and the order in which they appear on the account bar, click **Customize**.
- 2 To remove an account from the account bar, select the appropriate box for that account in the **Hide in Navigation** column. A check indicates that the account does not appear in the account bar.
- 3 To add an account to the account bar, remove the check mark in the **Hide in Navigation** column check box.
- 4 Accounts automatically appear in alphabetic order. To move an account up or down on the list, select the account and click **Move Up** to move it up the list, or **Move Down** to move it down the list. Repeat the move until the account appears where you want it on the list.
- 5 To move an account to a different category—for example, to move a savings account to a spending account—select the account and click **Change Group**.
- 6 Select the new category for the account and click **OK**.
- 7 To return to the Quicken Home page, click **Close**.



1



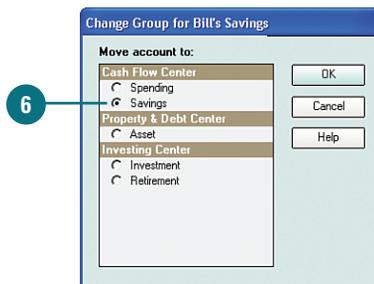
2

3

4

5

7



6

# Getting the Big Picture

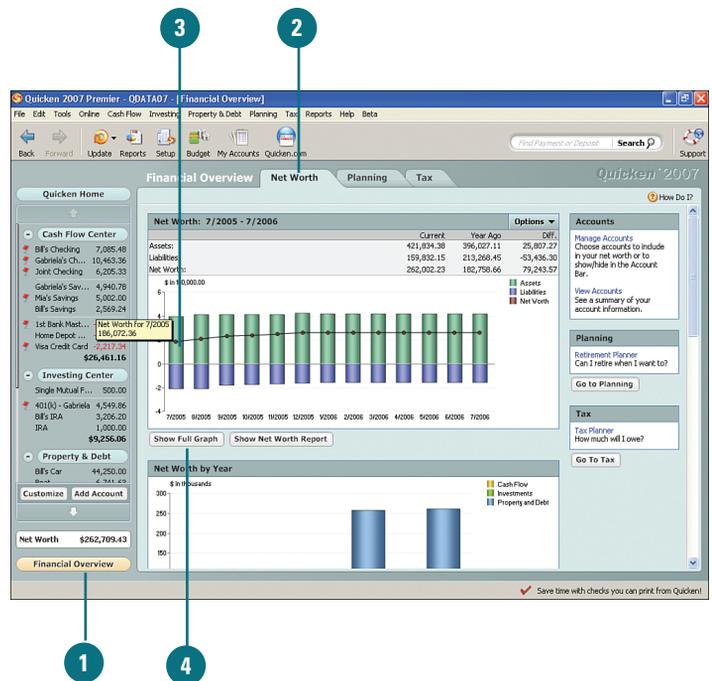
## View Your Assets, Liabilities, and Net Worth

- 1 On the activity bar, click **Financial Overview**.
- 2 If you're not already there, click the **Net Worth** tab to view a graph view of your assets, liabilities, and net worth over the past year.
- 3 To view your assets, liabilities, or net worth for a specific month, hover your mouse pointer (point, but don't click) over a bar on the graph. A tooltip box pops up, showing you what your net worth was for that time period.
- 4 To see a full view of the graph, click **Show Full Graph**.

### See Also

See Chapter 9, "Planning for the Future," on page 223, for more detailed information on using the Planning Center and creating plans. See Chapter 12, "Managing Your Tax Information," on page 325, for more information on using the Tax Center.

One nice feature of Quicken is the Financial Overview. It gives you a complete, big picture of your finances with the click of a button. It's a bird's-eye view of your overall net worth, based on your assets and liabilities for the month and for each month over the past year. Assets include savings or properties, and liabilities include your debt, such as credit card debt and loans. Your net worth is determined by subtracting your liabilities from your assets. You can see instantly where you stand and where you need to adjust your financial situation, if needed.



### For Your Information

#### You can get a clue with the color key.

There is a color key in the upper-right corner to help you determine which colors on the graph represent assets, liabilities, and net worth.

## View Net Worth Graph Details

- 1 From the Net Worth window, you can customize the graph by selecting a custom date from the **Date Range** drop-down or a different interval of time from the Interval drop-down.

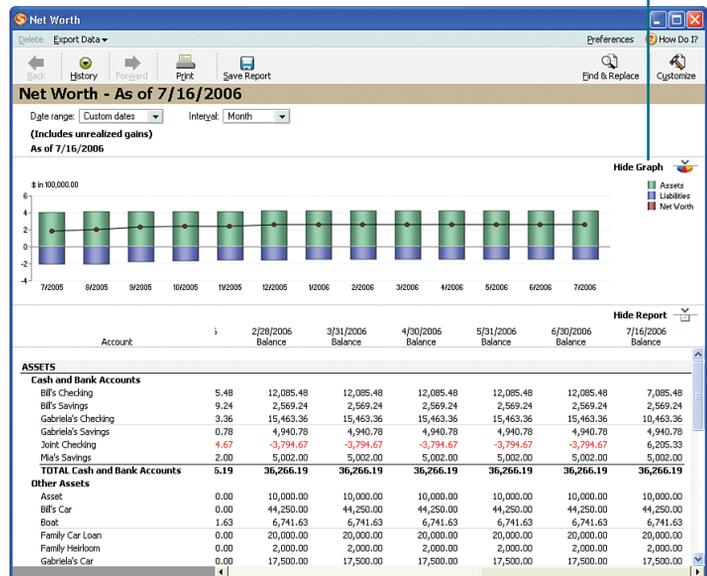
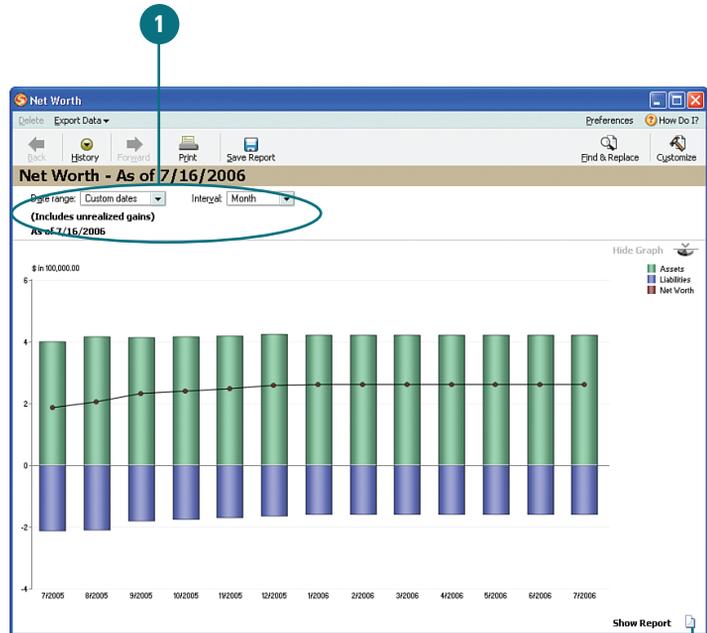
### See Also

See Chapter 11, "Working with Reports," on page 309, for more information on viewing, customizing, saving, and printing reports.

- 2 Click **Show Report** to see a detailed breakdown of your assets and liabilities, including their totals.
- 3 Click **Hide Graph** to view only the report showing the breakdown of your assets and liabilities. When you are finished reviewing the information, close the window.

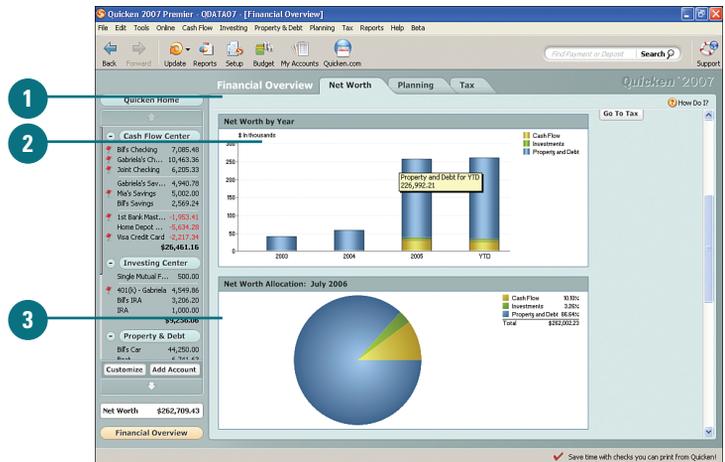
### Did You Know?

*There are alternative ways of accessing the graph and report.* There are multiple ways to access the full graph net worth view or the Net Worth report. You can use the Options menu located in the upper-right corner of the Net Worth tab on the Financial Overview to access the same information as shown in this and the preceding tasks. Clicking the **Show Net Worth Report** button (shown next to the **Show Full Graph** button in the previous task) also opens the Net Worth report. In addition, you can right-click the graph to access the full graph net worth view and report.



## View Additional Net Worth Breakdowns

- 1 To view additional net worth information, scroll down to the **Net Worth** section to reveal additional details.
- 2 The **Net Worth by Year** section shows your cash flow, investment, or property and debt net worth for a specific year or year-to-date. Hover your mouse over the bars to see the net worth for each activity.
- 3 The **Net Worth Allocation** section shows what percentage of your net worth comes from your cash flow, investment, or property.
- 4 Scroll down farther to view the **Net Worth by Year Summary** section. It provides net worth by year and year-to-date for each of your cash flow, investment, and property accounts. Figures that appear in red are negative net worth.



The screenshot shows the 'Net Worth by Year Summary' table in Quicken 2007 Premier. The table lists various accounts and their net worth for 2003, 2004, 2005, and YTD. The table is organized into sections: Cash Flow, Investments, and Property and Debt. Negative values are shown in red.

	2003	2004	2005	YTD
<b>Cash Flow</b>				
1st Bank-MasterCard	0.00	0.00	-1,953.41	-1,953.41
Bills Checking	0.00	0.00	14,274.37	7,085.48
Bills Savings	0.00	0.00	2,592.84	2,592.84
Gabriela's Checking	0.00	0.00	16,158.76	10,463.36
Gabriela's Savings	0.00	0.00	4,790.78	4,940.79
Home Depot Credit Card	0.00	0.00	-5,634.28	-5,634.28
Joint Checking	0.00	0.00	-2,969.67	6,205.33
Mia's Savings	0.00	0.00	5,002.00	5,002.00
Visa Credit Card	0.00	0.00	-2,449.34	-2,449.34
<b>Total</b>	0.00	0.00	29,769.45	26,461.16
<b>Investments</b>				
401(k) - Gabriela	0.00	0.00	4,151.36	4,548.86
Bills IRA	0.00	0.00	3,000.00	3,000.00
IRA	0.00	0.00	1,000.00	1,000.00
Single Mutual Fund - Billy	0.00	0.00	0.00	0.00
IRA	0.00	0.00	8,151.36	8,548.86
<b>Property and Debt</b>				
Asset	0.00	0.00	10,000.00	10,000.00
Bills Car	0.00	0.00	44,250.00	44,250.00
Bills Car Loan	0.00	0.00	-26,620.15	-26,620.15
Boat	0.00	9,500.00	6,741.63	6,741.63
Car Loan	-96,000.00	-96,000.00	-9,141.56	-9,141.56

## For Your Information

### You can hide accounts in Quicken.

Hiding an account doesn't mean you'll need to open up a Swiss bank account with an alias. When you want Quicken to track the balance of an account, but you don't want that balance used for net worth or considered for a debt reduction plan, you can hide it. For example, if you have a savings goal, you can continue to save the set amount each month; Quicken tracks how much you are saving, but the account and the amount are hidden until you reach your goal. Another situation where you should hide an account is when an account is closed or has a zero balance. Instead of deleting it, you should hide it so that Quicken can still use it for reporting and forecasting, but the account won't clutter up your account lists. For more, see the task on the next page.

# Selecting Accounts to Include in Your Net Worth

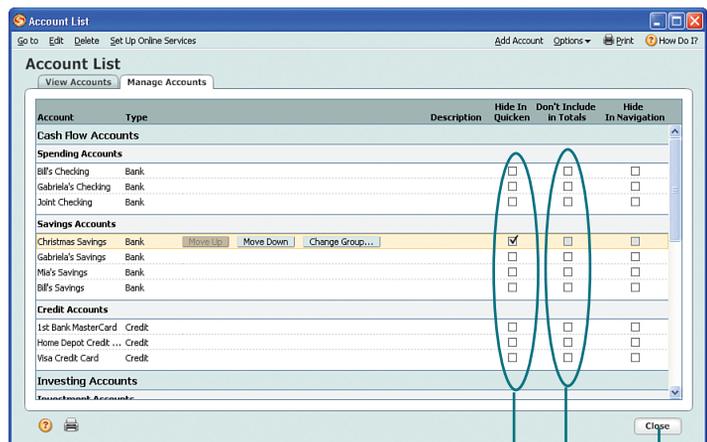
## Select Accounts to Include in Your Net Worth

- 1 On the Net Worth tab in the Financial Overview center, click the Manage Accounts link. The Account List window opens.
- 2 Select the boxes in the Hide in Quicken column for each account you want to hide from account lists and net worth totals. Or, to remove a hidden account, select the checked box for that account.
- 3 Select the boxes in the **Don't Include in Totals** column for each account you want to exclude from your net worth totals. Or, to include totals for an account, remove the check mark by clicking it.
- 4 When you are finished selecting or removing accounts for your net worth totals, click **Close**.

### Did You Know?

*There are other ways to access the Account List window. You can access the Account List window by clicking **My Accounts** on the toolbar or by clicking **Customize** on the account bar.*

By default, Quicken uses all the accounts that you have set up to determine your net worth. You can add and remove the accounts you want Quicken to use when determining your net worth. Removing an account that you don't want to use for your net worth does not remove it from Quicken. You are simply telling Quicken that you don't want it to use the financials for that account when it calculates your net worth. By changing the accounts you want used for your net worth, you can make better financial decisions about your savings, investments, debt, and so on by seeing which accounts are working for you or against you.



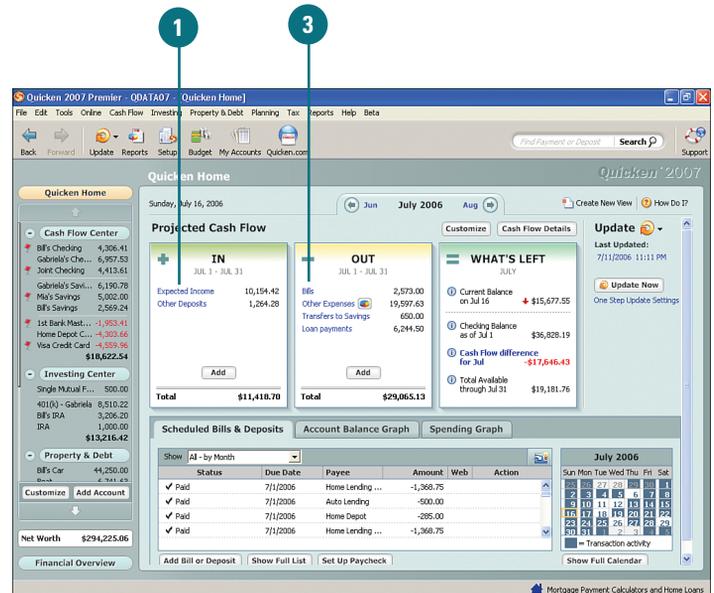
# Using Projected Cash Flow

## View Your Cash Flow

- 1 The **IN** section provides projections for all your income. Click **Expected Income** to view a list of your paid and scheduled income transactions by date.
- 2 Click **Close** when you are finished to return to the Projected Cash Flow page.
- 3 The **OUT** section provides projections for all your outgoing bills and expenses. Click **Bills** to view a list of your scheduled bills and transactions by date.

*Continued, next page*

The first section on the Quicken Home page is Projected Cash Flow. It provides a forecast of your incoming and outgoing cash flow for the current month. Your projected cash flow is based on all the information you've entered into Quicken, including your scheduled transactions and historical trends, if applicable. You can view what your income and expenditures are and what's left after your expenditures have been subtracted from your income. In addition, you can add new income or expenditure transactions, access a comprehensive list of your income and expenditures, and view your cash flow for each day of the month. The Projected Cash Flow section allows you to have your finger on the pulse of your incoming and outgoing cash flow.



close X 2

Expected Income		
Income		
Name	Date	Amount
Top Technology Inc.	Jul 13	2,850.60
Networks Inc.	Jul 14	2,226.61
Upcoming Income		
Name	Date	Amount
Top Technology Inc.	Jul 27	2,850.60
Networks Inc.	Jul 28	2,226.61
<b>Total</b>		<b>\$10,154.42</b>

4 The **WHAT'S LEFT** section provides projected balances after your expenses and bills have been deducted from your income. Click **Cash Flow difference for [month]** to view a list of all your scheduled income and expenses by date.

5 From the Cash Flow Details window, you can access your account registers or print the list. Click **Close** when you are finished.

6 To add a new income or expense transaction, click **Add** and complete the Add Transaction window.

### See Also

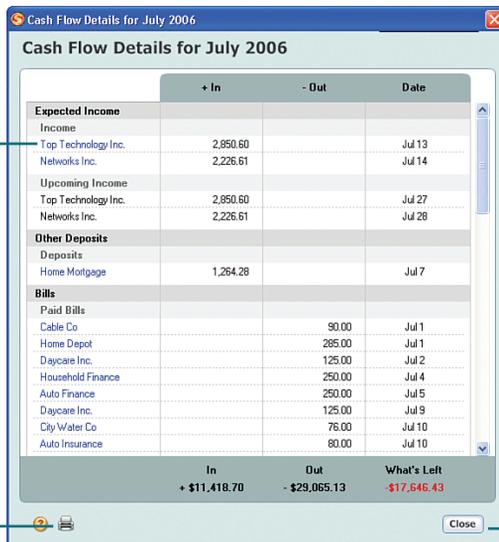
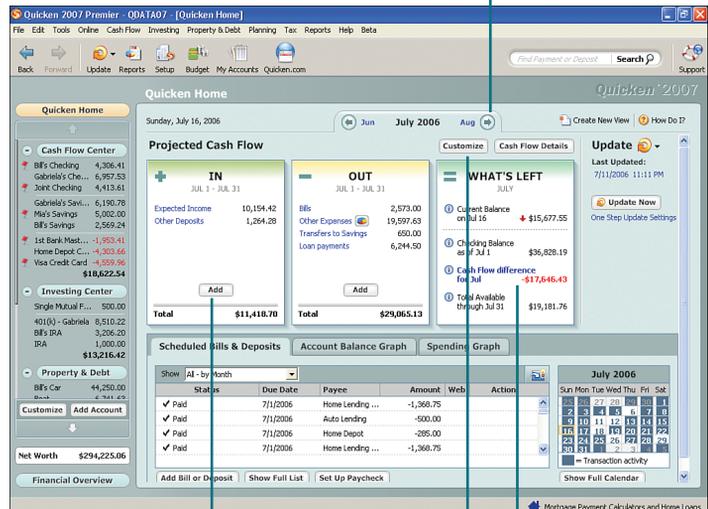
See "Adding New Bills" on page 149 for more information on adding account transactions.

7 To change the accounts in your cash flow or to exclude an account from your account totals, click **Customize** and make the appropriate changes.

### See Also

See "Selecting Accounts to Include in Your Net Worth" on page 64 for more information on selecting or excluding the accounts used to determine your cash flow.

8 To view projections for a previous month, click the back arrow; to view future months, click the forward arrow.



Click a link to open the account register.

Click to print the list.

### For Your Information

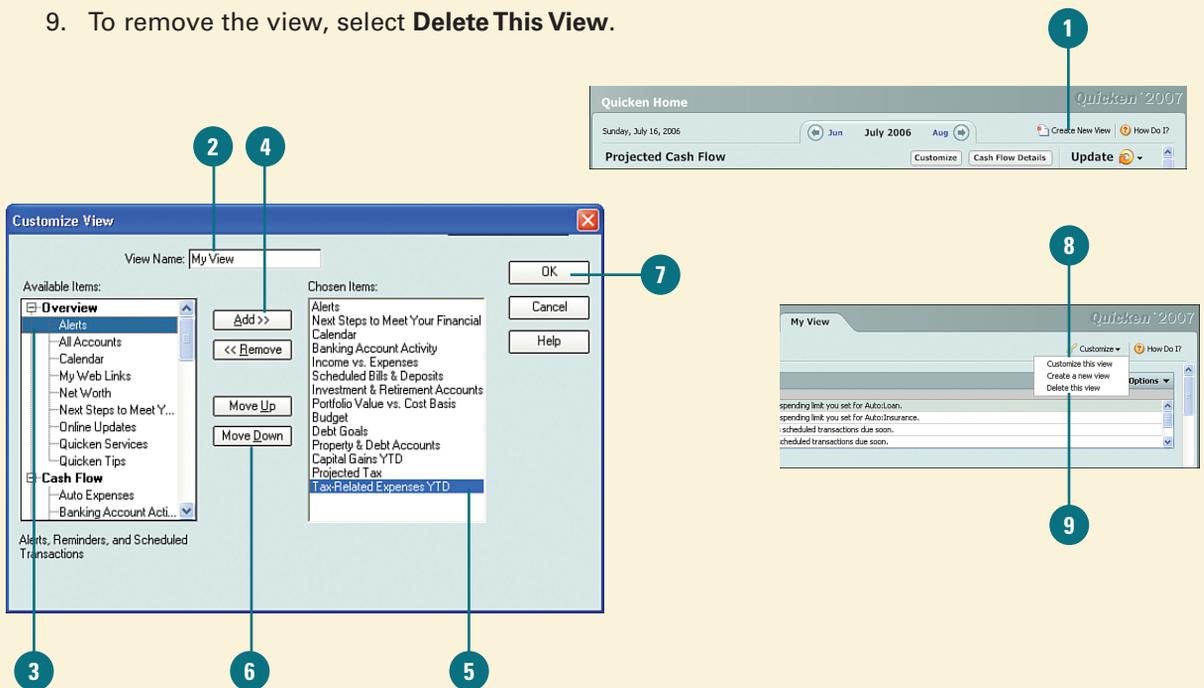
You can click the **Cash Flow Details** button above the What's Left section to open the Cash Flow Details window, in addition to using the Cash Flow Difference link shown in step 4.

# You Can Create Your Own Look for the Quicken Home Page

If the default Quicken Home page design doesn't work for you, change it. To do this, follow these steps:

1. From the Quicken Home page, click **Create New View**.
2. Type a name for the new view.
3. From the **Available Items** section, select the items you want to add to your view. You can select more than one item by holding down the **Ctrl** key and clicking each item you want to add.
4. Click **Add**. The items you select move to the Chosen Items section.
5. To remove an item, from the Chosen Items section, select it and click **Remove**.
6. To specify the order in which the items appear on the Quicken Home page, from the Chosen Items section, select an item and click **Move Up** to move it up one space or click **Move Down** to move it down one space. Repeat this step until the items appear the way you want.
7. When you are finished creating your new view, click **OK**. Quicken creates the new view and displays it on a new tab.
8. You can update your view by clicking the **Customize** drop-down menu on your new tab and selecting **Customize This View**.
9. To remove the view, select **Delete This View**.

3



# Using Scheduled Bills & Deposits

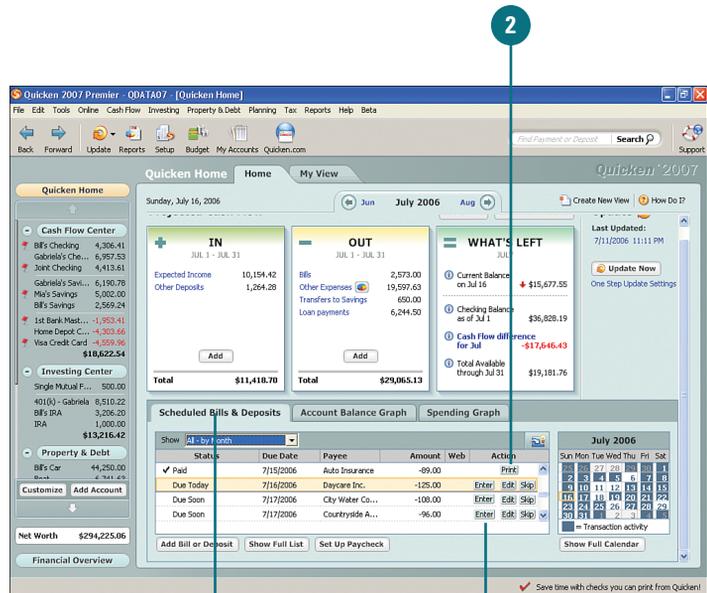
## Record Transactions

- 1 Open the Quicken Home page and scroll down to the **Scheduled Bills & Deposits** tab.
- 2 If a Print button appears next to a transaction, it is because that transaction is paid using Quicken checks, which are printed on special checks that you print using your printer.
- 3 Click **Enter** to log a transaction in your register. The transaction information opens in the Record Transaction window.

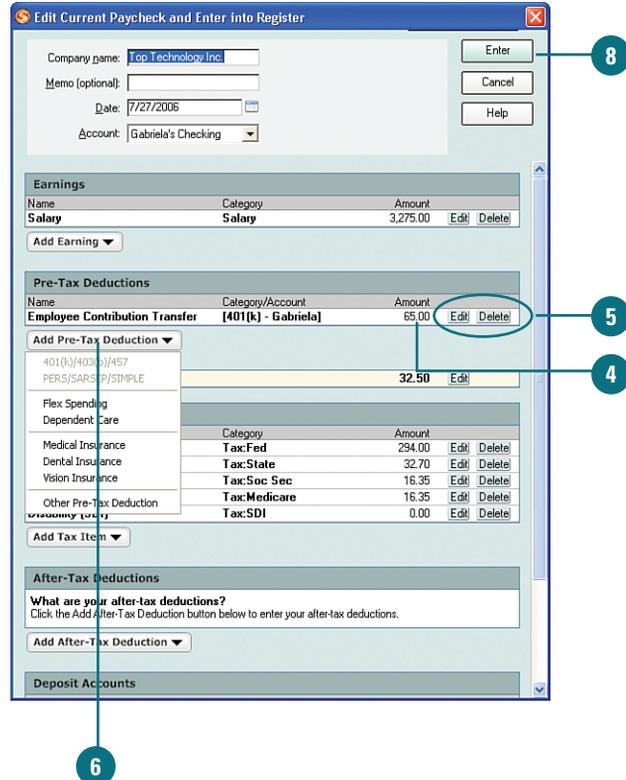
### Did You Know?

*The status and color of a transaction and the check mark next to it tell you what actions you need to take.* When you select the All-by Month option from the Show menu, the check marks next to transactions mean they have already been recorded in your register. If the transaction appears in red, it means that it is overdue. If Due Soon appears next to a transaction, look at the Due Date column to take note of when it is due. If Due Today appears in the Status column, the transaction is due on the current day. Use the Current-by Status to sort all your transactions to quickly see which transactions are overdue and which are coming up soon.

The Scheduled Bills & Deposits section of the Quicken Home page lists all transactions for the current month and those that have not been completed from previous months. Transactions include paychecks, bills, mortgage payments, utilities, banking, and every other account transaction you have entered in Quicken. You can use Scheduled Bills & Deposits to enter the transactions in your register—for example, when you make a payment for a bill or when a paycheck has been deposited into your bank account. In addition, you can add new transactions, change information for a single transaction, make changes to all transactions for an account, or delete a transaction. There are also some tools you can use to review your account checks and balances over a specific period of time by using graphs, or you can use the calendar to see exactly where your transactions fall within a month. Scheduled Bills & Deposits provides an efficient and quick way of keeping up with your incoming and outgoing account transactions.

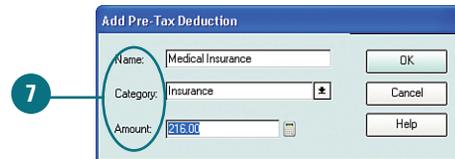


- 4 To make changes to this transaction—for example, an amount—clicking in any of the fields and type over the existing information.
- 5 You can also click the **Edit** and **Delete** buttons to change or remove information, respectively, as shown in this example.
- 6 To add information to a paycheck transaction, click one of the **Add** buttons. For example, in this instance we are updating a paycheck transaction by clicking **Add Pre-Tax Deduction** to add medical insurance information.
- 7 Change the name, if needed, select the category that you want to use to track this expense, type the amount, and click **OK**.
- 8 When you are finished making changes, or if you don't need to make any changes to the transaction, click **Enter** (as in this example). Or, if you are recording a payment, click **Record Payment**.



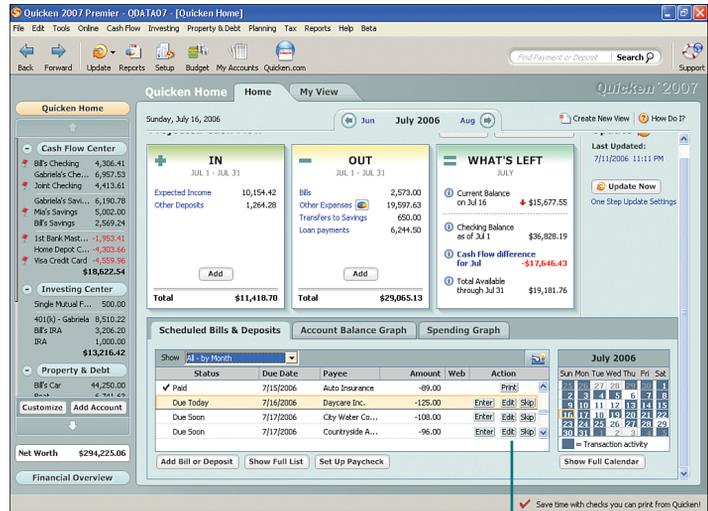
### Did You Know?

**Changes that you make when entering a transaction apply only to that transaction.** When you enter a transaction and make changes to the transaction information, the change applies only to the current transaction. The change does not apply to future transactions for the account. If you want to make changes that apply to all transactions for an account, you must edit the transaction. See “Edit Transactions” on the next page.

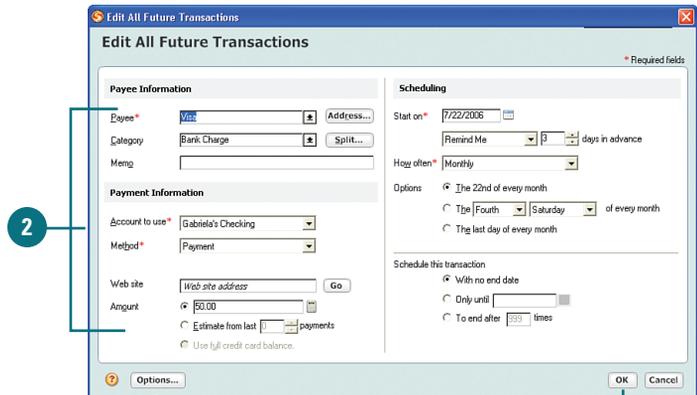


## Edit Transactions

- 1 To edit all future instances of a scheduled transaction, from the Scheduled Bills & Deposits section of the Quicken Home page, click **Edit** next to the transaction you want to update.
- 2 Make any changes needed, keeping in mind that these changes will take effect for all future transactions for this account.
- 3 To change when you want to be reminded the transaction is due, whether you want the transaction to appear as a bill in Scheduled Bills & Deposits, or to change the group to which it is assigned, click **Options**.
- 4 Click **OK** to save the changes.



1



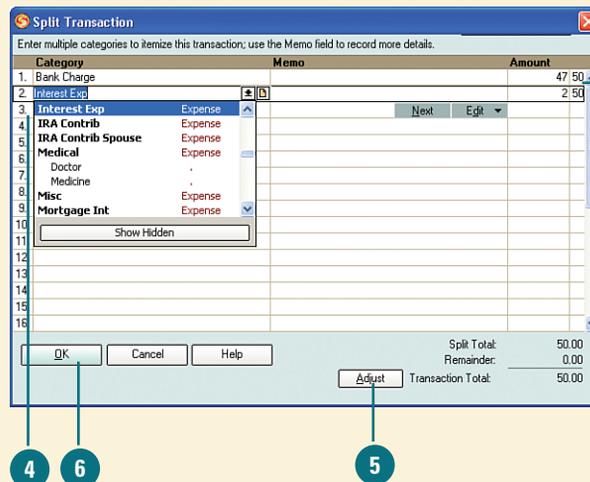
3

4

# Tracking Transactions with Multiple Categories

If you want to track a transaction between different categories, you can add up to 30 categories. For example, if you want to track a payment you make to a credit card, for which part of the payment goes to the principal balance and part goes to satisfy interest, you could track this transaction under the Bank Charge and Interest categories.

1. You can split a scheduled transaction from either the Edit All Future Transactions window (accessed by using the **Edit** button from **Scheduled Bills & Deposits**) or the **Add Transaction** window (accessed from the Quicken Home page but not shown).
2. Click **Split** (not shown).
3. In the Split Transaction window, in the **Amount** box, type the amount you want to track for the first category.
4. Click the second line and from the **Category** drop-down menu, select the second category. Then type the amount for that category.
5. Create as many categories as you need (up to 30) and when you are finished, click **Adjust**. The figure in Transaction Total should equal the total amount of the transaction. If it is not, adjust your split amounts until the total equals the correct amount.
6. Click **OK** to complete the split. The Category field for this transaction now shows "Split" and is grayed out. You can change the split by repeating this task.

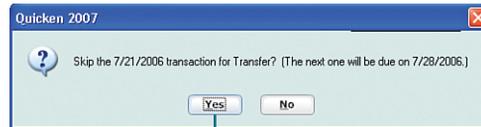
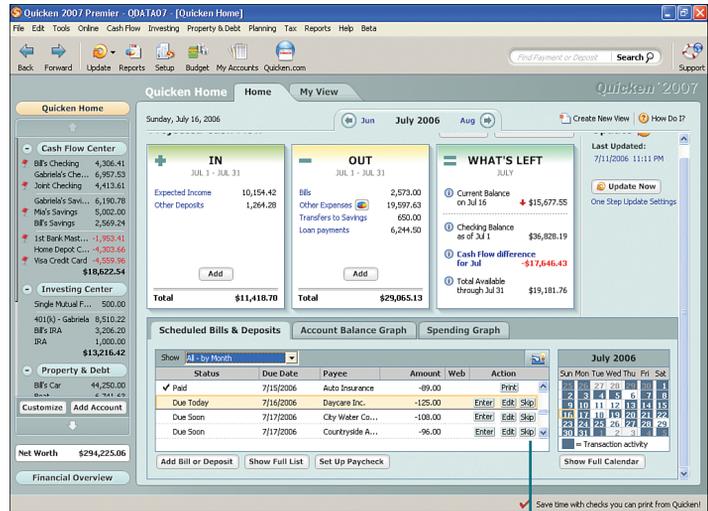


## Skip Transactions

- 1 To skip the current transaction, for example, if you don't intend to apply a transaction for a particular time period (for example, for the current month), in **Scheduled Bills & Deposits**, click **Skip**.
- 2 Click **Yes** to skip the current transaction or **No** to cancel. If you click **Yes**, the transaction will show up in the **Scheduled Bills & Deposits** list the next time it is due.

### Did You Know?

**Check marks show completed transactions.** The check marks next to the transactions shown in step 1 indicate that those transactions have been entered in the appropriate registers.

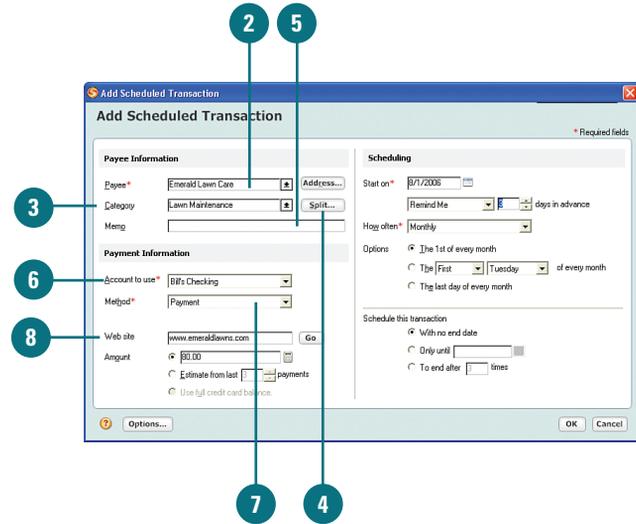
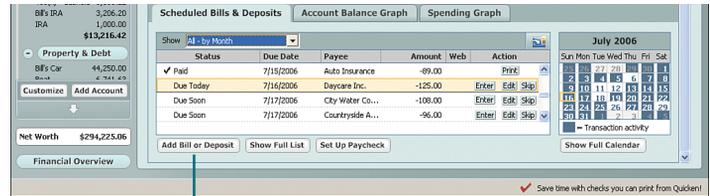


## Add a New Transaction

- 1 In **Scheduled Bills & Deposits**, click **Add Bill or Deposit**.
- 2 In **Payee**, type the name of the recipient (a person, company, creditor, or for money transfers, the name of the account) to which the transaction is being made, if applicable.
- 3 From **Category**, select the category you want to track for this transaction. If you don't see the category you want to use, type in a new one. (When you click OK in step 12, you are prompted to create the new category.)
- 4 To assign more than one category to a transaction (with the exception of transfers), click **Split**.
- 5 Click in **Memo** to type a note about the transaction, if desired.
- 6 From the **Account to Use** drop-down list, select the account from which payments are made.
- 7 From the **Method** drop-down list, select the type of transaction. This example uses Payment.
- 8 If a website is associated with this bill—for example, if you are making payments through a creditor's website—type the website address in the **Web Site** field.

### See Also

See "Working with Reports" on page 309 for more information on running reports. See "Tracking Transactions with Multiple Categories" in this chapter for information on assigning more than one category to a transaction.



### Did You Know?

**Assigning categories can help you track your spending.** By assigning categories to all your transactions, you can see exactly where your money is going. Quicken tracks categories across all your accounts so that when you run a report, it can show you exactly how much you've spent for a specific category.

9 In **Amount**, type the amount of the transaction. If you used split transactions, the amount will already be there, but will be grayed out so that you can't enter an amount. If the amount varies, type **0** or select the **Estimate** option and specify the number of payments to use as an average.

10 In the Scheduling section, select or enter the begin, end, and frequency information for the transaction. If this is a one-time transaction, from **How Often**, select **Only Once**.

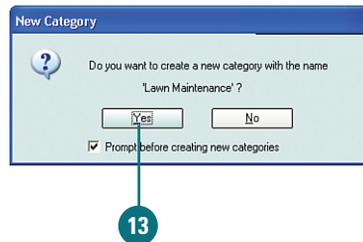
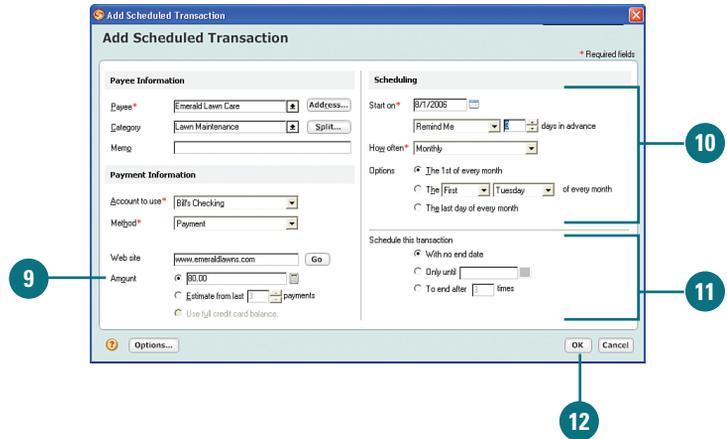
11 In the Schedule this Transaction section, select an option to indicate when you want the transaction to stop. If the transaction does not have an end date or you are unsure when it will end, select **With No End Date**.

12 Click **OK**. The transaction is added to the Scheduled Bills & Deposits list.

13 If you entered a new category in step 3, you are prompted to enter a new category. Click **Yes** to set up the new category in the Set Up Category window or **No** to select a different category.

### Did You Know?

**You can pay your online bills directly from Quicken.** When you enter a website address in the Web Site field in the Add Scheduled Transaction window, Quicken places a Go link next to that transaction in the Scheduled Bills & Deposits section of the Quicken Home page and in the Cash Flow Center. You can click **Go** and open the site to pay your bill without leaving Quicken.



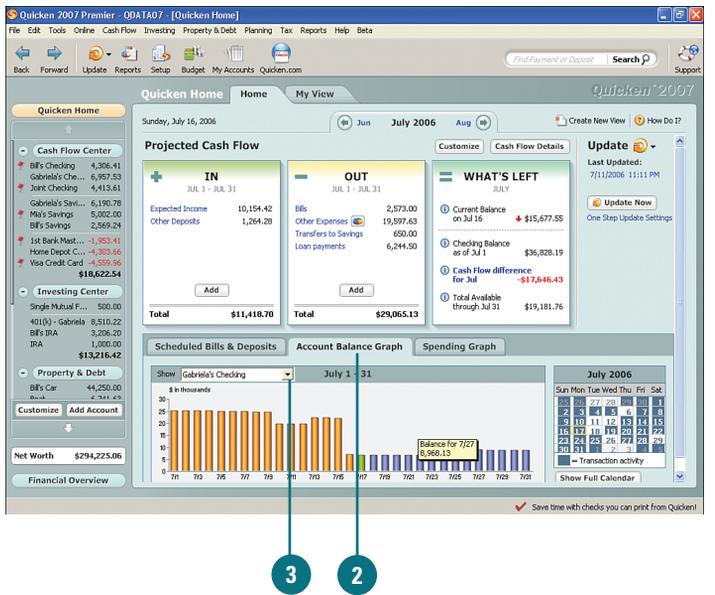
### Did You Know?

**You can add the payee address to use later.** To add the address for a payee, click the **Address** button next to the Payee drop-down menu and complete the Address window. Be sure to select the **QuickFill List** option so that the payee is available throughout Quicken. By selecting this option, when you are working in other areas of Quicken and you need to use this payee—for example, when using Quicken checks—Quicken can automatically complete the payee address information for you and print the information on Quicken checks. In addition, if you have the Premier Home and Business version of Quicken, you can use the address for printing mailing labels, envelopes, and business forms.

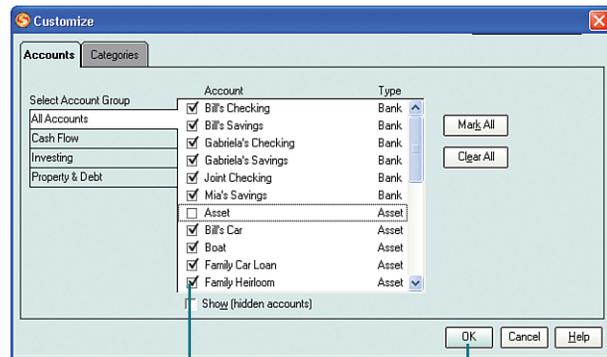
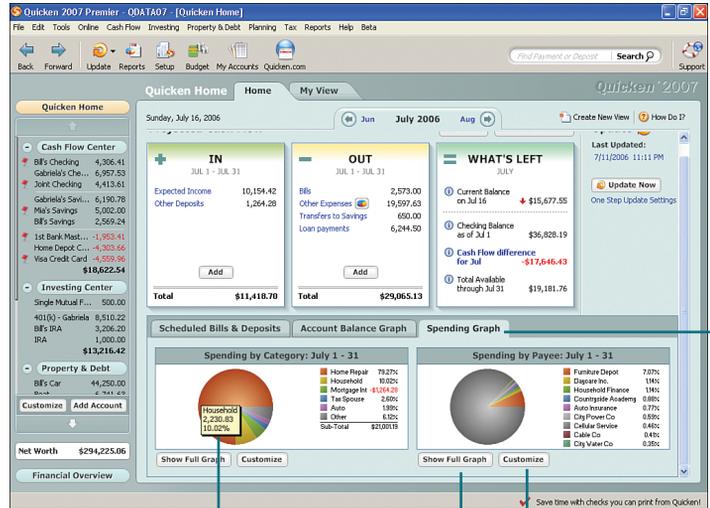
## Create an Alternative View of the Transactions

- 1 To change the transactions you see, select an option from the **Show** drop-down menu.
- 2 To see a bar graph view of your finances, click the **Account Balance Graph** tab. Hover your mouse over a bar on the graph to view your balance for that time period.
- 3 To view a different account, select it from the **Show** drop-down list.

*Continued, next page*



- 4 To view spending for your accounts broken down by category and payee, click **Spending Graph**.
- 5 To get a closer look at a specific category or payee, hover your mouse over a slice of the pie chart.
- 6 To view the Expenses report for either your account categories or payees, click the **Show Full Graph** button.
- 7 To add or remove accounts from either your account categories or payees, click the **Show Full Graph** button.
- 8 From the **Accounts** tab, select or clear the accounts you want included in the spending totals and from the **Categories** tab, select or clear the categories you want to use.
- 9 Click **OK** when you are finished.

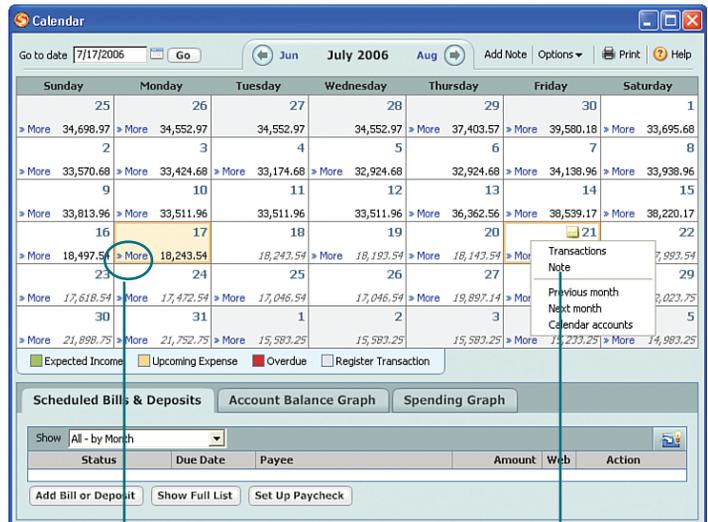
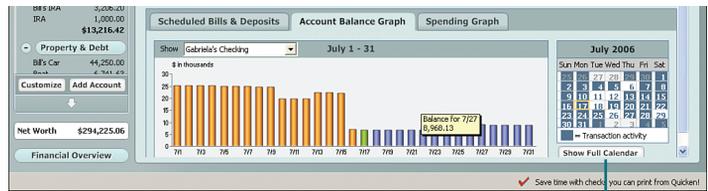


## Use the Calendar to View Monthly Transactions

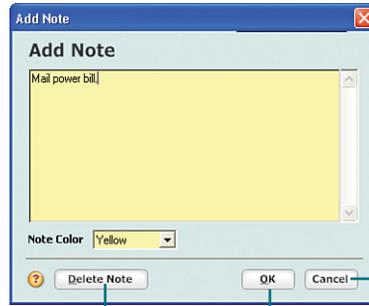
- 1 To view calendars with the dates of all your transactions, from either the Scheduled Bills & Deposits or Account Balance Graph tabs, click **Show Full Calendar**.
- 2 Click **More** on any day of the calendar to view the transactions for that day in detail.
- 3 Perform actions to manage your transactions, such as creating a new transaction, recording, or editing the transaction.
- 4 Click **Close** when you are finished.
- 5 To add a note to a day on the calendar, right-click the day and select **Note**. You can also click **Add Note** on the menu.

### Did You Know?

*Use the calendar to manage your transactions and bills.* Print the calendar to keep as a reminder or reference when paying your bills by clicking **Print** on the Calendar window menu.



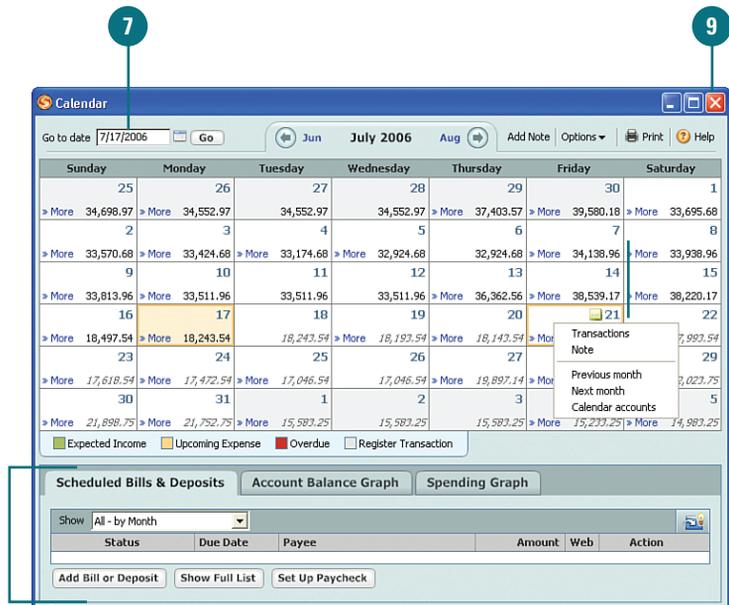
- 6 Type your note and click **OK**. The note shows up on the calendar as a small sticky note, which you can click to open, edit, or delete.
- 7 To view a different month, select it from the **Go to Date** field and click **Go**. You can also click the back and forward arrows.
- 8 You can perform the same functions from the calendar as you can from the Quicken Home page.
- 9 When you are finished using the calendar and ready to return to the Quicken Home page, close the calendar.



Click to remove the note.

6

Click to cancel the note without saving it.



7

9

8

# Using Online Updates

There is a little feature on the Quicken Home page that shouldn't be overlooked. You can use it to make your life easier when it comes to managing your financial goals and maintaining all your accounts. It is the Update feature, which you can use to tell Quicken the accounts for which you want to download cleared transactions or quotes, when you want to download them, and how often. You can also select account information that you want to upload to Quicken.com via the Internet. You use the One Step Update to do all of this. In addition, using the Update feature, you can also manage your passwords and schedule your online account updates.

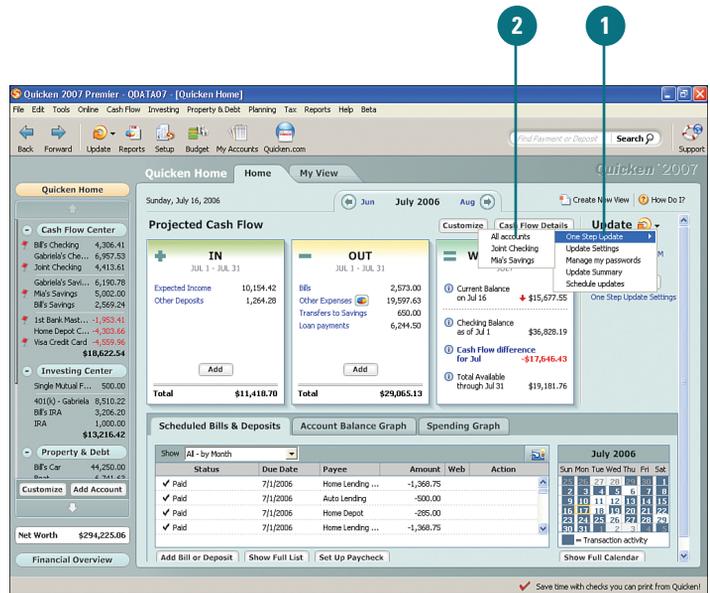
## Set Up Online Updates

- 1 Click **Update** and select **One Step Update**.
- 2 Select a specific account you want to update or select **All Accounts** to update all of your accounts in Quicken. If you have not set up any of your accounts for online updates, you are prompted to do so. Also, if you have not already registered Quicken, are prompted to do so.

**IMPORTANT** Only the accounts that you have set up for online access are listed for you to choose from. Remember that your copy of Quicken must be registered before you can use this feature. If your bank or creditor offers online access to your account information, you should have a login ID and password. You will need this information to set up One Step Update.

### See Also

See "Registering Quicken" on page 24 for more information on registering your copy of Quicken.



3 To set up or change updating investment and stock quotes, select the **Download Quotes, Asset Classes, Headlines, and Alerts** option.

4 If an account has already been set up for online updates, select the accounts you want to use or clear the accounts you no longer want to download.

5 If an account has not been set up yet but online update is available, click **Activate for One Step Update**.

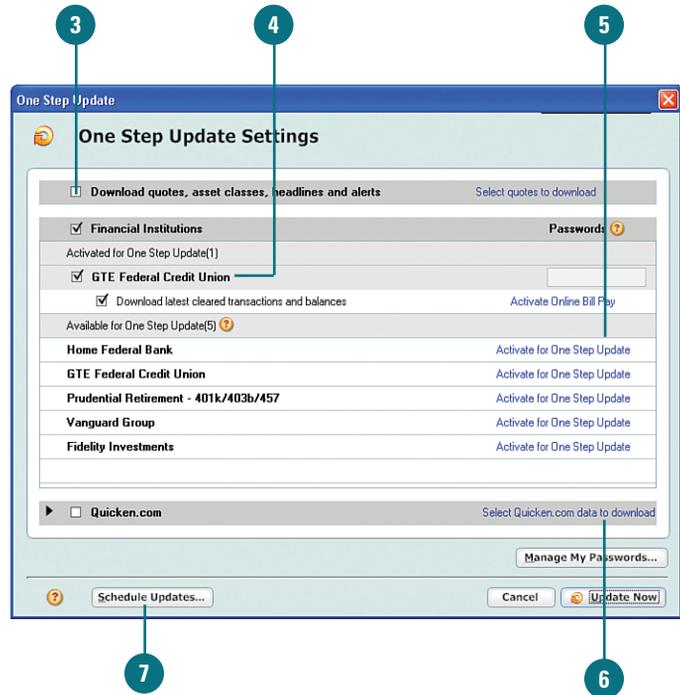
6 To upload information to Quicken.com, select the **Quicken.com** option and then select **Select Quicken.Com Data to Download**.

7 To select the information you want to download and/or update, click **Schedule Updates**.

*Continued, next page*

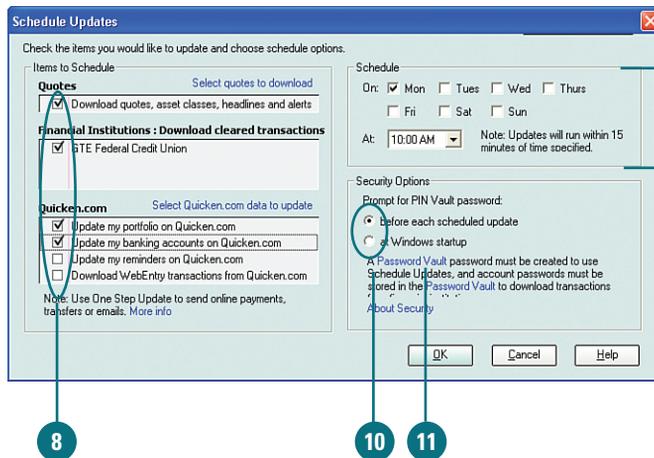
### See Also

See "Setting Up Remote Internet Access to Your Accounts" on page 53 for more information on using Quicken.com.



- 8 Select the information for which you want to schedule times to download.
- 9 Select the days on which you want the update to run and then from the **At** drop-down list, select the run time. Updates run within 15 minutes of the time you select.
- 10 Select when you would like to be prompted to enter your password.
- 11 To set up a PIN Vault password, click **Password Vault**. A PIN Vault password is required in order to use scheduled updates.

**TIMESAVER** Take advantage of the online updates. Using the online updates to download your account transactions and investment quotes enables you to always keep your accounts up-to-date with the latest information. When you download your transactions, Quicken automatically places the transactions on the Downloaded Transactions tabs in each of the appropriate account registers. From there, all you have to do is add the transactions to your register. This saves you time and ensures that your balances and transaction information are accurate. This saves you even more time and frustration when it comes time to balance your accounts.



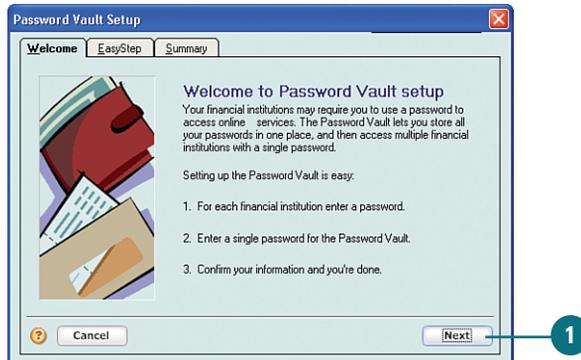
## Set Up Your Passwords in the Password Vault

- 1 Review the Password Vault information and click **Next**.
- 2 Select the financial institution for which you want to enter the account password and click **Next**.
- 3 Click **Add Password Vault** to set up a password to protect the Password Vault (not shown).
- 4 In **Password**, type your PIN Vault password. In **Re-enter**, type it again, and then click **Add**.

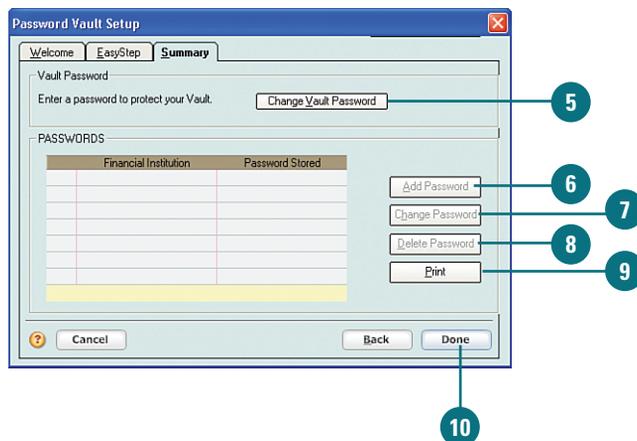
### Did You Know?

**You can use the Password Vault to keep track of all your account passwords.** So that you don't have to remember your account passwords for all your online accounts, use the Password Vault. Once you enter all of your account passwords into the Password Vault, you can then set up one password that will allow you to access all of your online accounts through Quicken. Do your research to make sure that your accounts are safe. Ensure that your financial institutions offer secure connections, you have a good Internet service provider that offers secure and private Internet access, secure your computer with a personal firewall and virus protection software, and password-protect your Quicken file. Also, regularly change your passwords (every three months or so) as an extra security measure.

*Continued, next page*



- 5 To change your Password Vault password, click **Change Vault Password**.
- 6 To add a new password, click **Add Password**.
- 7 To change your password, click **Change Password**.
- 8 To remove a password, select it and click **Delete Password**.
- 9 To print the list of passwords, click **Print**.
- 10 When you are finished with your passwords, click **Done**.



# Keyboard Shortcuts

There are alternative ways you can move around in Quicken, other than using the menus or links found on Quicken windows. You can use certain keyboard key combinations, as shown in Table 3.1, to quickly get where you want to go. Keyboard commands are broken down into logical categories. Some shortcut commands require two or more keys. To use these shortcuts, you press and hold the first key and then press and hold the second. For example, to open the Quicken Home page from anywhere in the program, you hold down the Alt key and then press the Home key.

If you elected in Quicken Preferences to use Quicken standard keyboard commands, be aware the common keyboard commands for Windows change when you're in Quicken. For example, to use the Windows **Cut** command while you're in Quicken world, the keyboard shortcut is **Shift+Del**; for **Copy**, it becomes **Ctrl+Ins**; and for **Paste**, it's **Shift+Ins**. In addition, these commands only work in specific areas of Quicken—for example, account registers. If you are not sure of the commands available to you while you're in a specific area of the program, refer to the main menus. The available shortcuts appear on the appropriate menus in Quicken.

**Table 3.1** Quicken Keyboard Shortcuts

<i>Quicken Features</i>	
<b>Command</b>	<b>Shortcut</b>
Go to the Quicken Home page	Alt+Home
Go to the register	Ctrl+R
Write checks	Ctrl+W
Go to the calendar	Ctrl+K
View loans	Ctrl+H
Go to the Account list	Ctrl+A
Go to the Category list	Ctrl+C
Go to the Class list	Ctrl+L
Go to the Scheduled Transaction list	Ctrl+J
Go to the Memorized Payee list	Ctrl+T
Print	Ctrl+P
Select an item in a list	Type the first letter of the item

### Check Features

Command	Shortcut
Decrease date or check number	- (minus key)
Increase date or check number	+ (plus key)
Copy data from the field above the currently selected field in the Split Transaction window	' (single quote key)
Copy the payee name when the address field is selected in the Write Checks window	' (single quote key)
Copy a field in the register	Ctrl+Ins
Cut a field in the register	Shift+Del
Paste a field in the register	Shift+Ins
Delete a transaction or split line	Ctrl+D
Find a transaction	Ctrl+F
Go to a new transaction	Ctrl+N
Insert a transaction	Ctrl+I
Memorize a transaction	Ctrl+M
QuickFill, automatic recall	Type payee name
QuickFill, automatic completion	Tab
Record a transaction	Enter or Ctrl+Enter
Open the Split Transaction window	Ctrl+S
Go to Transfer	Ctrl+X
Void a transaction	Ctrl+V

### Investment Features

Go to Portfolio view	Ctrl+U
Decrease or increase a security price by 1/16	- (minus key) or + (plus key)
Select a security	Ctrl+Y

### Help

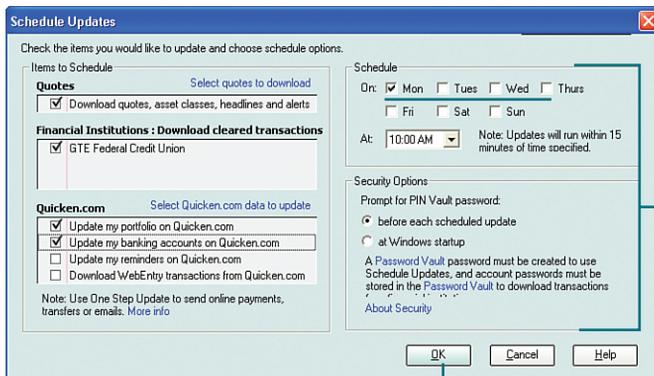
Open the Help contents	F1
------------------------	----

## Review and Complete Online Updates

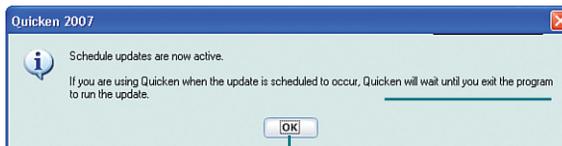
- 1 Review your scheduled updates selections and make any necessary changes.
- 2 Click **OK** to complete the scheduled updates.
- 3 Click **OK**. At the scheduled time, Quicken displays the Password dialog box, prompts you to type your Password Vault password, and downloads/uploads the latest transactions. When the transmission is complete, a summary window opens showing the accounts were successfully downloaded.

### Did You Know?

**Quicken cannot update accounts while it is open.** You cannot have Quicken open when it downloads account information. Instead, you are prompted to enter your Password Vault password and the information is downloaded at the designated time. You should see an icon in your Windows taskbar that lets you know Quicken is downloading. If you are in Quicken at the time an update is scheduled to run, Quicken waits until you are out of the program to download the transactions and upload any online payments.



2



3