

Getting Started Quicken 2011 for Windows



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
- Categorize your transactions
- Set up your bills and income
- Set some spending goals
- 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.

The screenshot shows the Quicken Home tab dashboard. At the top, there are navigation tabs: Home, Spending, Bills, Planning, Rental Property, and More From Quicken. Below the tabs is a 'Main View' section with an 'Add View' button and a 'Customize' button. The dashboard features three main sections:

- 1 See Where Your Money Goes**: A section with a pie chart icon. It includes a 'Get Started' button and a '10 MINUTES to complete' indicator.
- 2 Stay On Top of Monthly Bills**: A section with an envelope icon. It includes a '5 MINUTES to complete' indicator.
- 3 Track Spending Goals to Save Money**: A section with a shopping bag icon. It includes a '5 MINUTES to complete' indicator.

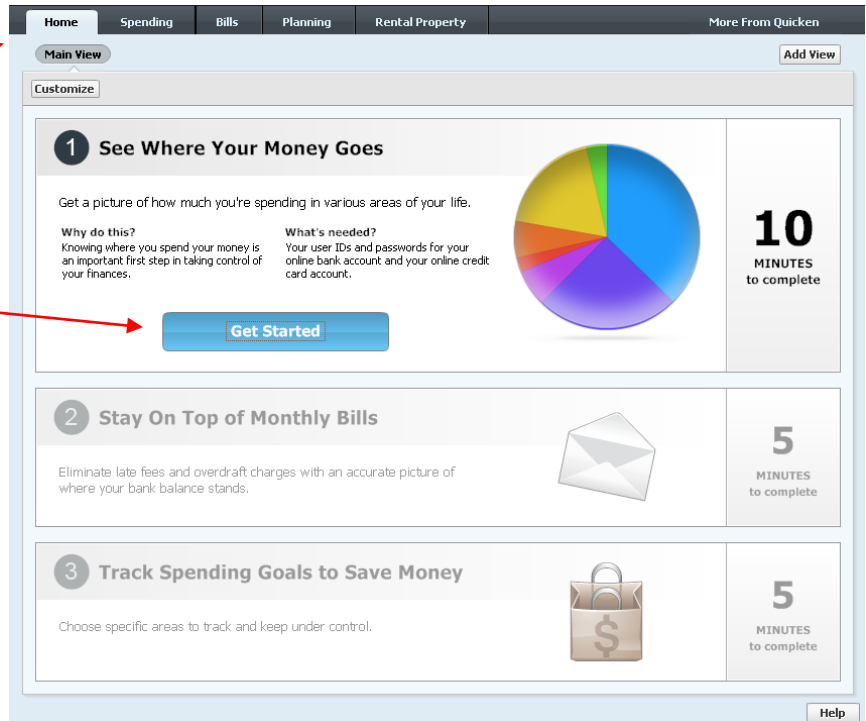
At the bottom right, there is a 'Help' button.

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.

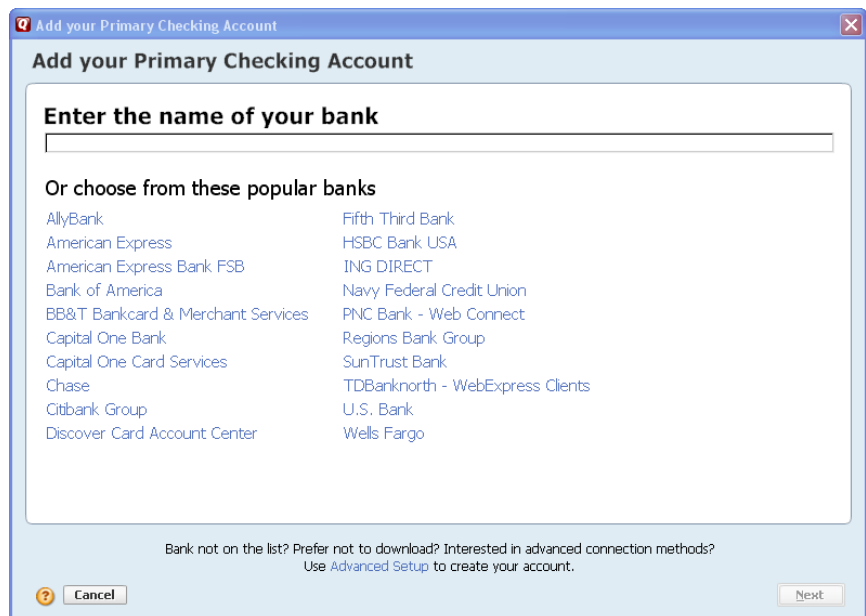
2. Click **Get Started** in the *See Where Your Money Goes* section.



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.



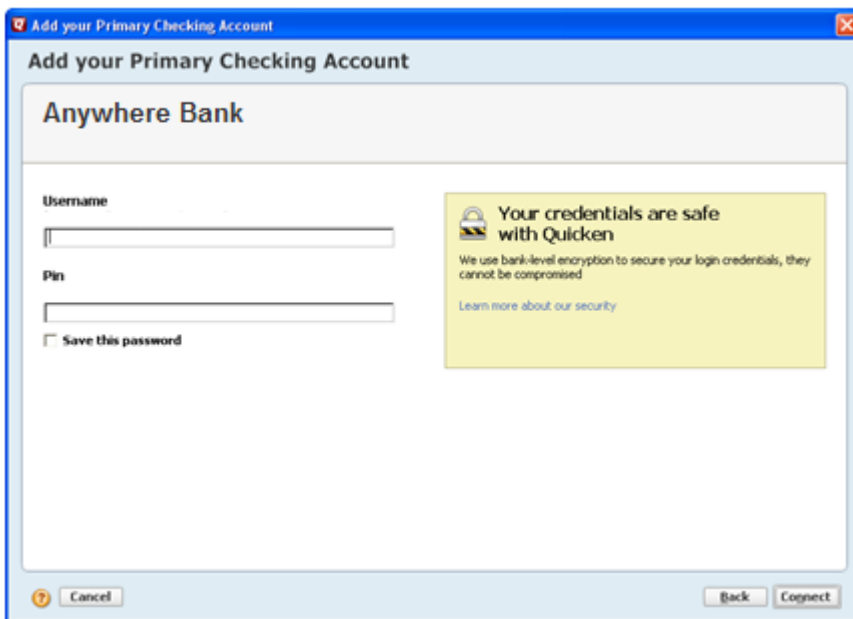
Set up your first account

4. Enter your bank login information.

For most people this is the same login they use for their bank's web site.

5. Click **Connect**.

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



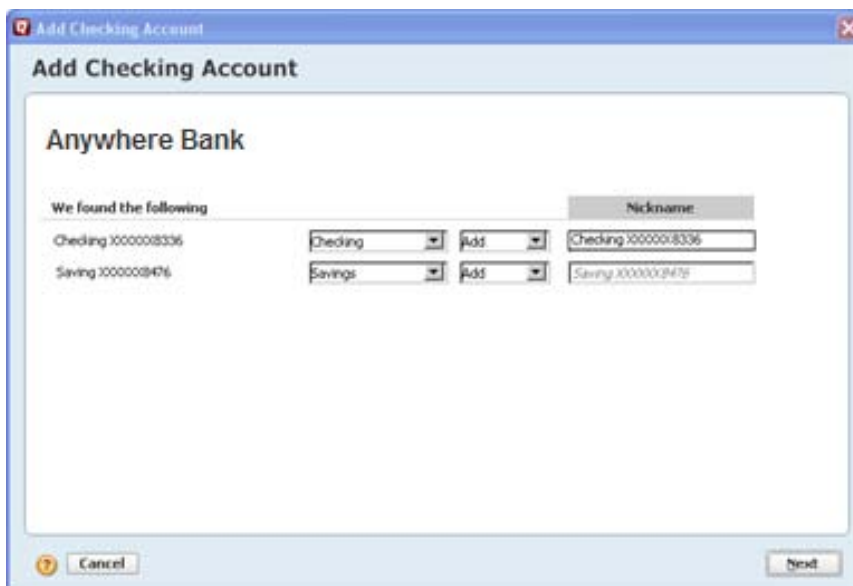
The screenshot shows a dialog box titled "Add your Primary Checking Account" for "Anywhere Bank". It contains input fields for "Username" and "Pin", a checkbox for "Save this password", and a yellow security notice that reads: "Your credentials are safe with Quicken. We use bank-level encryption to secure your login credentials, they cannot be compromised. Learn more about our security." Buttons for "Cancel", "Back", and "Connect" are visible at the bottom.

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*.



The screenshot shows a dialog box titled "Add Checking Account" for "Anywhere Bank". It displays a table of found accounts with columns for account type, action, and nickname. The table lists a Checking account (XXXXXXXX8336) and a Savings account (XXXXXXXX2476). Buttons for "Cancel" and "Next" are at the bottom.

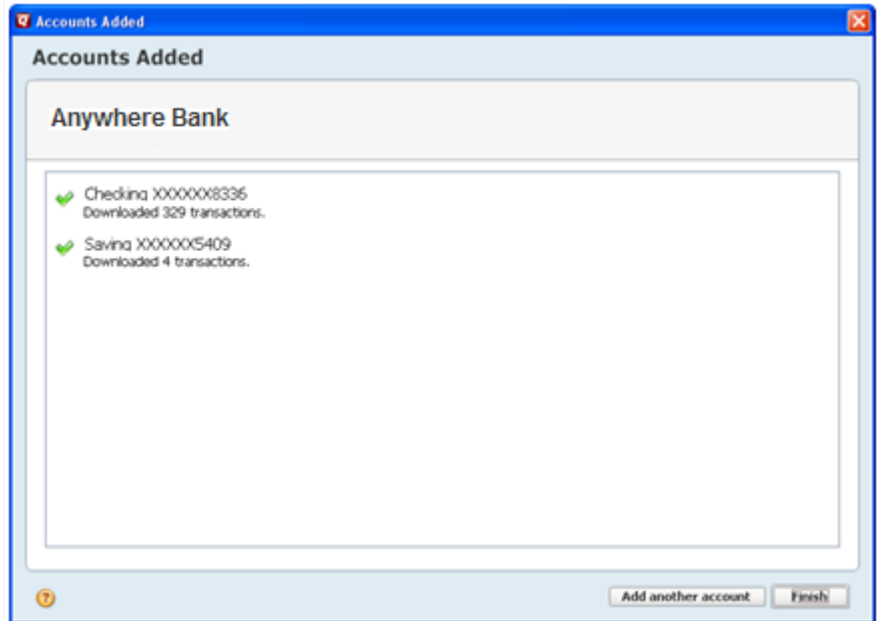
We found the following			Nickname:
Checking XXXXXXXX8336	Checking	Add	Checking XXXXXXXX8336
Saving XXXXXXXX2476	Savings	Add	Saving XXXXXXXX2476

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 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 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 **Account Actions** 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.

Date	Check Number	Payee	Memo	Tag	Category	Payment	Deposit
8/16/2010		Online Transfer To Barden A Ref		[Savings]			
8/16/2010		Online Transfer Ref #IBET900036		[Savings]			
8/16/2010		Recurring Transfer Ref #OPEB995F		[Savings]			
8/16/2010		Online Transfer Ref #IBEPYC960s		[Savings]			
8/16/2010		Office Depot		Office Expenses (B)			
8/16/2010		Shell		Auto & Transport (G)			
8/16/2010		Check-Old Purchase 08/15 E & O T		Bills & Utilities			
8/16/2010		Safeway		Food & Dining (Groc)			
8/16/2010		ATM	ATM Withdrawal - 206 King Street	Cash & ATM			
8/16/2010	6595	Check # 6595		Entertainment			
8/17/2010	248	Check # 248		Home/Home Service			
8/18/2010		ATM	ATM Withdrawal - 809 Cuesta Dr S	Cash & ATM		200.00	1,487.79
8/19/2010							

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.)

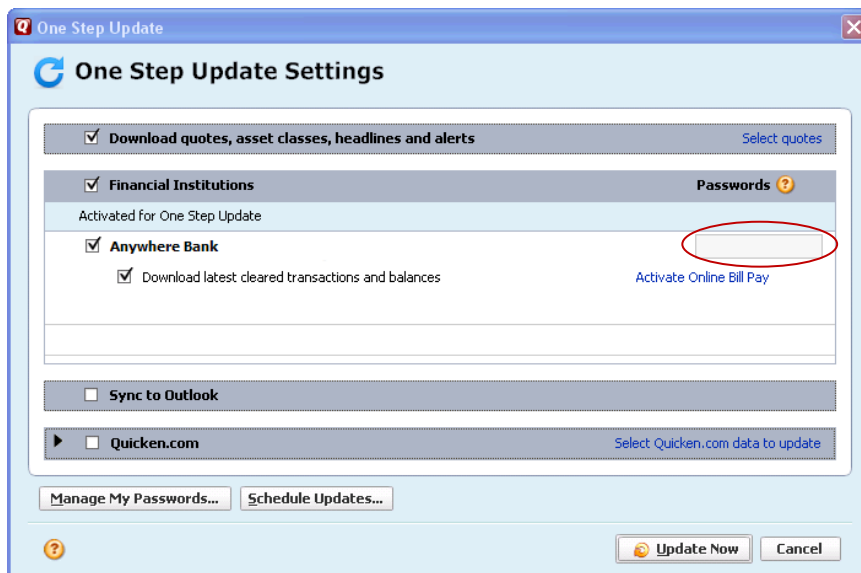


2. **Enter the account password.**

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...

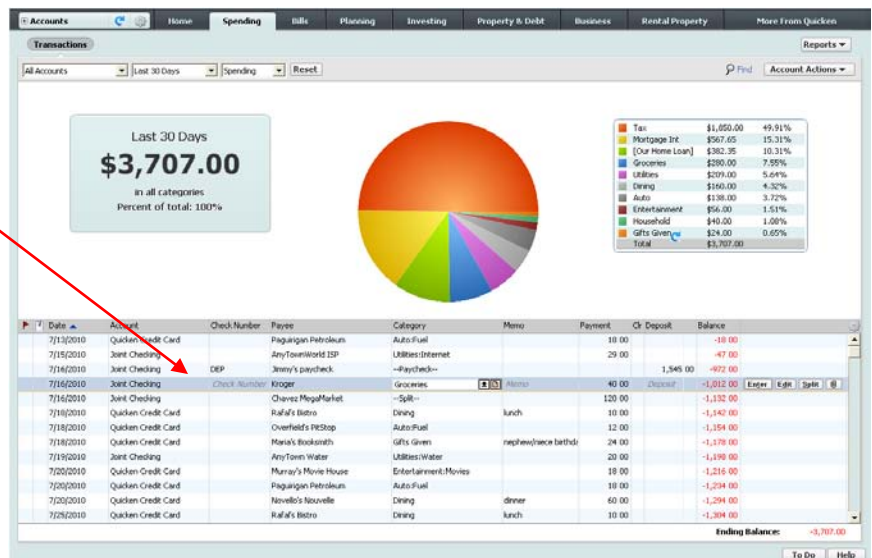
Use the Spending tab to categorize transactions


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!

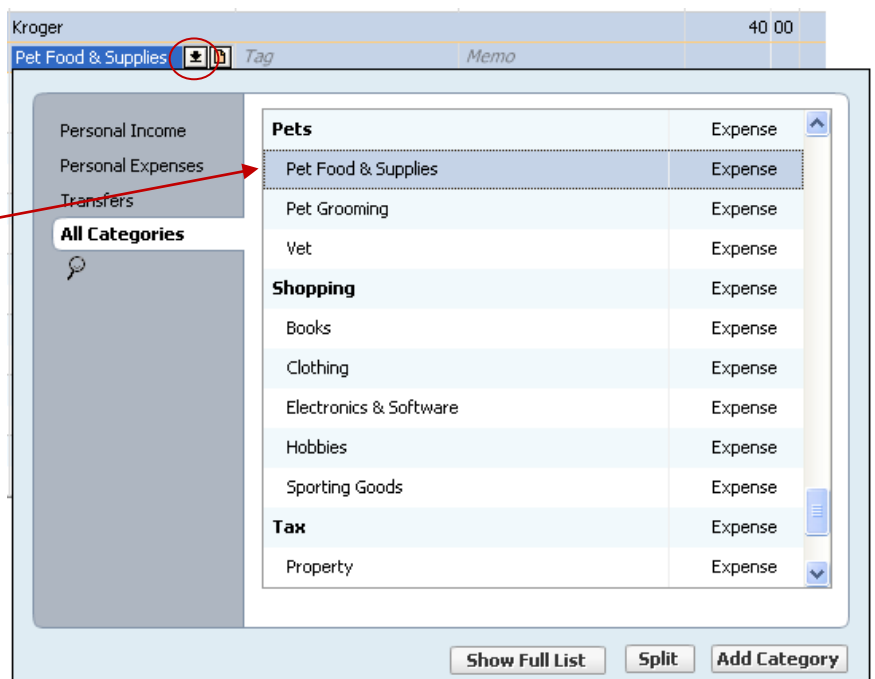
1. Click the **Spending** tab.
The Spending tab shows you the transactions from your spending accounts. It also has a cool pie chart that shows you where your money is going.



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



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



4. 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.

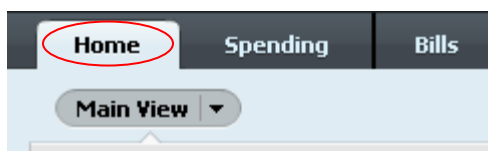
If the category you want isn't in the list, click the **Add Category** button.

Set up your bills and income

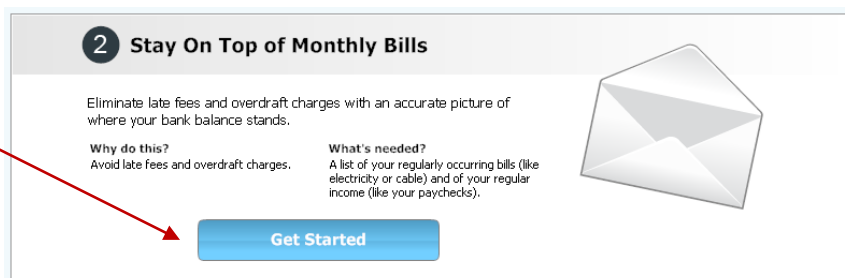
OK. So now you have a one or two accounts set up in Quicken and you can download transactions and use categories to see where your money is going. What's next? What more could there be? Beyond tracking your spending, Quicken actually makes it easier to spend your money. And we mean that in a good way!

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...

1. Click the **Home** tab.

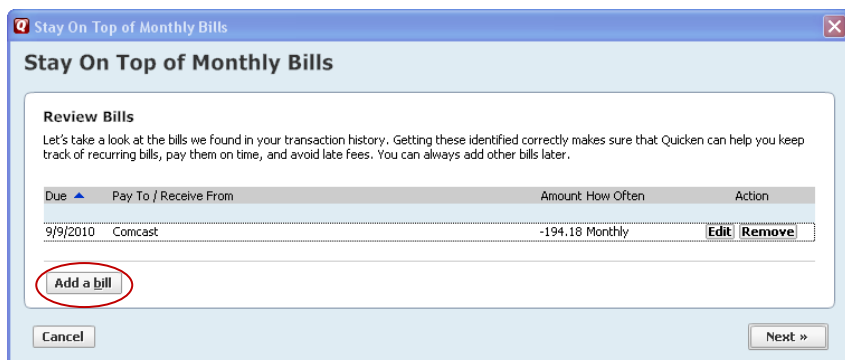


2. Click **Get Started** in the *Stay on Top of Monthly Bills* section.

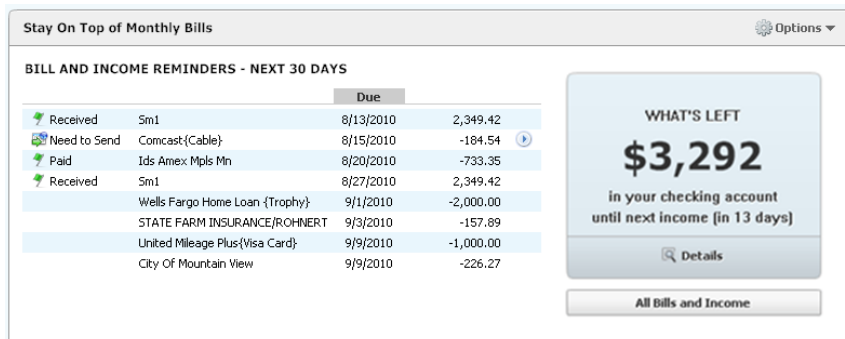


3. Click **Add a bill** to tell Quicken about any bills it doesn't know about yet.

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.



4. **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** and select **Change date range** to change the time period displayed.

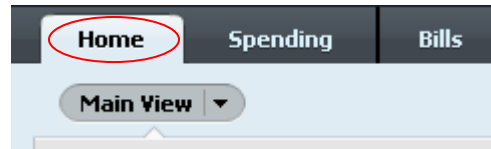


Set some spending goals

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. Think about it as "budgeting lite". 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.

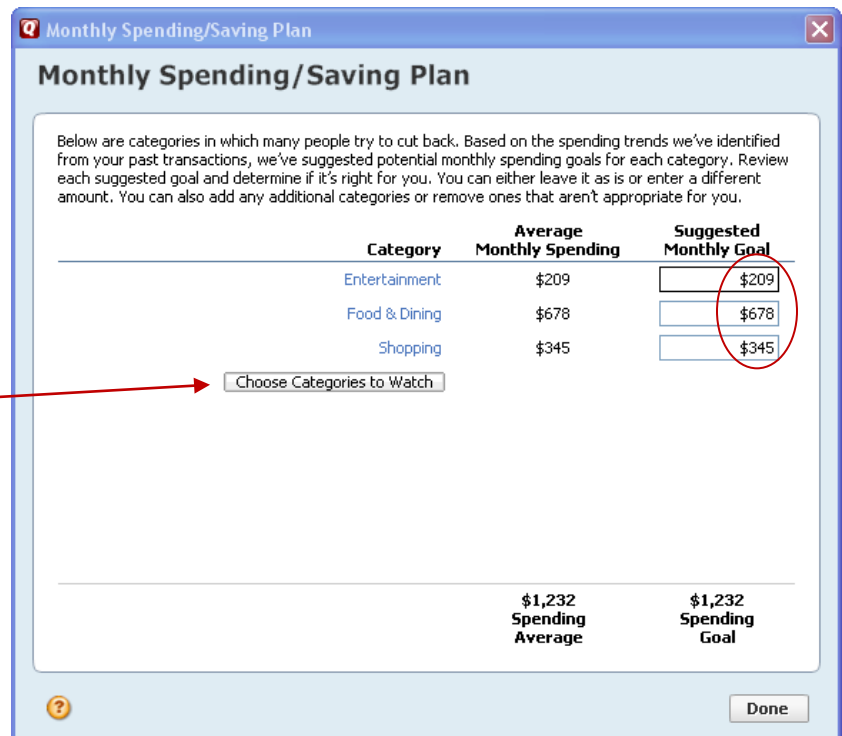
1. Click the **Home** tab.



2. Click **Get Started**, in the *Track Spending Goals to Save Money* section.



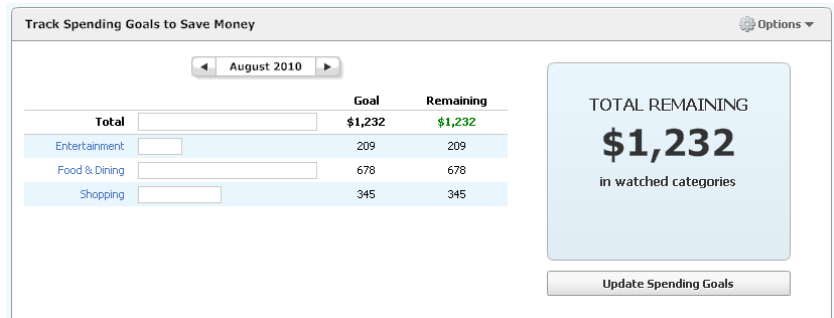
3. Quicken displays a few categories you might want to track, and your average monthly spending for each.



4. **Change your goals** by editing the amounts and by choosing new categories to watch.

Set some spending goals

5. **When you've finished**, the *Track Spending Goals to Save Money* section on the Home tab shows you how you are doing on each goal, and your overall spending on all of your goals.



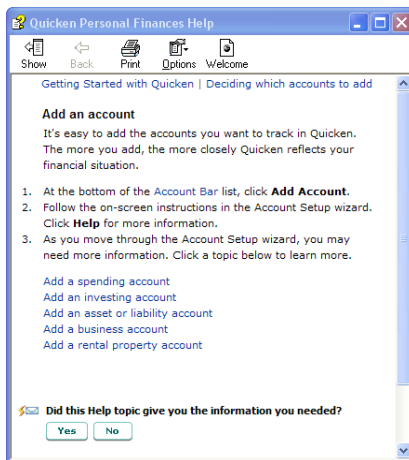
Get more out of Quicken

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.

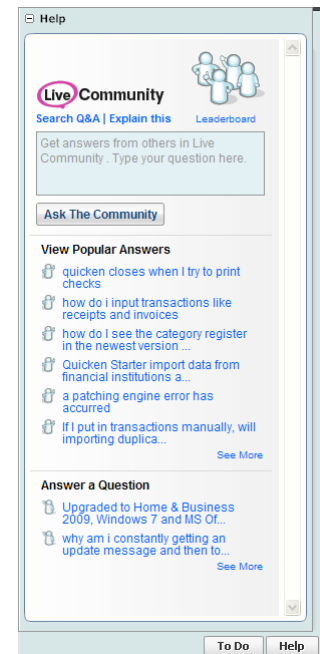
Get help when you need it

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.



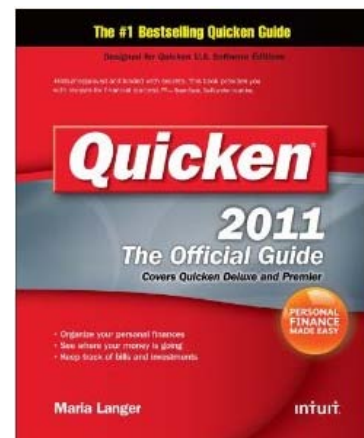
Quicken Help
Includes explanations about how work and steps on how to do most tasks. From the Help menu, choose Quicken Help.

Quicken Live Community
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



Quicken Support
If you run into a bug or other malfunction in Quicken, contact Support at quicken.com/support

McGraw Hill's Quicken: The Official Guide
Offers a more thorough intro to Quicken and all of its features. Available at many bookstores and online.



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