

CHAPTER 2- GETTING STARTED

In this chapter, new Quicken users will learn how to create a data file. For those users who are upgrading from an earlier version of Quicken, this chapter will go through restoring your old data file with Quicken 2015.

And for all users, this chapter will also cover checking and modifying the Quicken 2015 program settings, making modifications to the main toolbar and backing up the data file.

If you are upgrading to a newer version of Quicken from an earlier version, skip the next section and go to the section [“Upgrading To Quicken 2015” on page 11](#) later in this chapter.

First Time Into Quicken After Being Loaded Onto Your Computer

During the installation of Quicken, the Install Wizard will “Check for Quicken Updates.” From the time your CD was produced, Quicken may have released updates that make Quicken better, or have repaired some software problems.



Click Next, Launch Quicken 2015 or double click on the Quicken icon on your desktop.

The program will then bring up a window with the heading: **WELCOME TO QUICKEN 2015.**

The program wants to know if you are a new user or if you are already a Quicken user. For the purpose of this manual:

DO NOT click I’m New.

The reason: Quicken will by default name your Quicken data file the same name as your computer. Yes, your computer has a name. However, you might want your Quicken data file to be different than your computer name. You might want your Quicken data file to be your Farm Name or your Family Name. Naming your Quicken data file will allow you to find the file on your computer. The Quicken data file will have a file extension of *.QDF. The Quicken data file will contain all your accounts, categories, tags, reports, etc. All the information that Quicken uses is in one file, making it much easier to manage data files on your computer. Older versions of Quicken had as many as four separate files that Quicken used to operate. Quicken 2015 uses one file for account data.

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To custom name your Quicken Data File to match your farm or family



Click File
New Quicken File



Next, you will be prompted to type a custom File name and select a location of where you want your Quicken data file saved. Quicken by default will create a Quicken folder in your Documents folder on your computer. You may use this default folder or navigate to a custom location on your computer and add a Quicken Data folder.

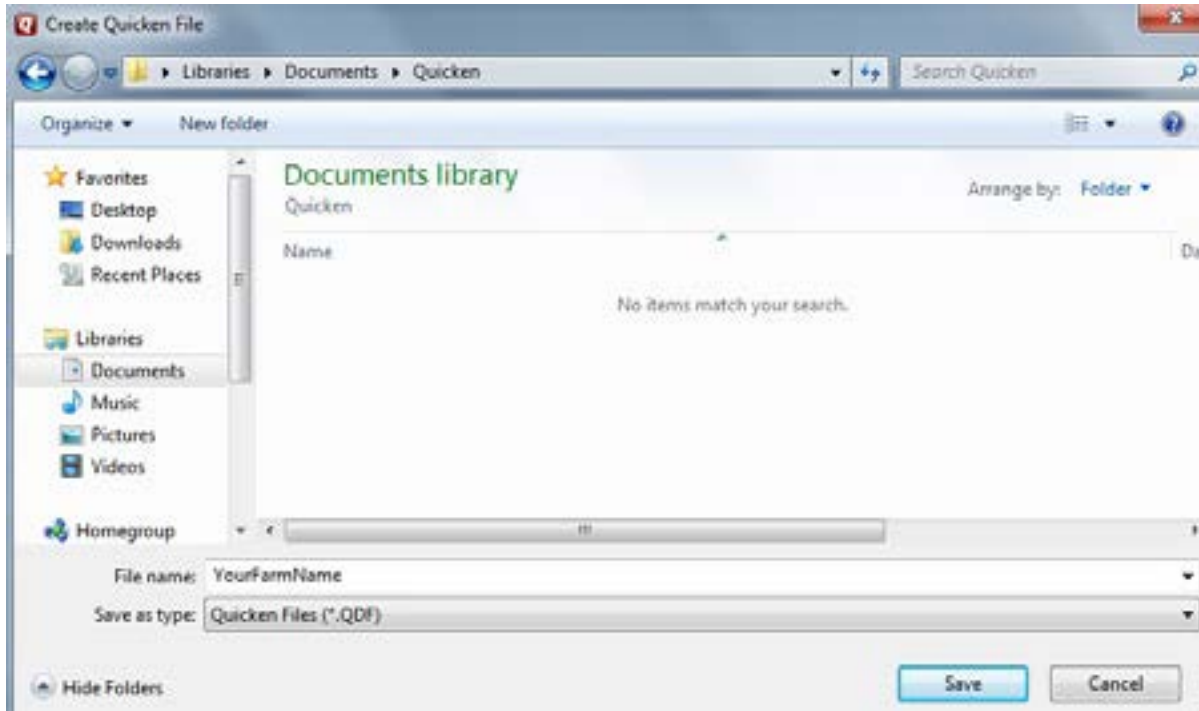
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Click in the blank to the right of File name.

Type in a name for your data file. A suggestion would be to use your last name or your business name as your data file name.

Click Save to close the CREATE QUICKEN FILE window.



The program will then create your named data file and open the *Sign-in with your Intuit ID* window.



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What is Intuit ID? This is new for Quicken 2015. Quicken 2015 requires an Internet connection for registration of the software and to set up the first account added to your Quicken data file. Intuit is the company that makes Quicken and Quickbooks. Intuit ID is used for software registration and for people that use the Quicken mobile app. The mobile app allows Quicken users access to their Quicken data while away from their home/office computer. Once the software is registered and the first account is added, Quicken 2015 can be operated without Internet connection. However, software updates can only be obtained with an Internet connection as well as online banking and billpay features. Features of the Quicken mobile app can be found at: <http://www.quicken.com/>

After creating an Intuit ID and/or signing in, a *Sync to Mobile* window will appear.

Note: It's recommended to click "Use Mobile" during this set up, even if you don't plan on using the Quicken mobile app right away or at all.



**Click Use Mobile
Next**



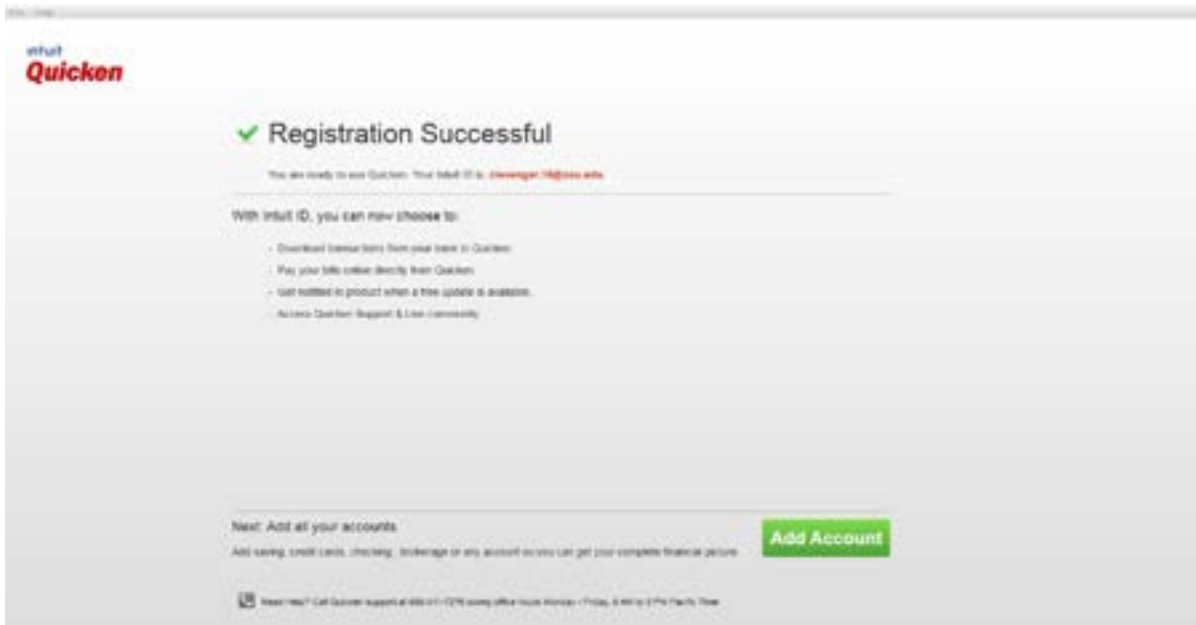
The next window will say Registration Successful.

Click the green button Add Account.

In the Add Account window click Cancel.

We will add new accounts to this Quicken file in Chapter 3.

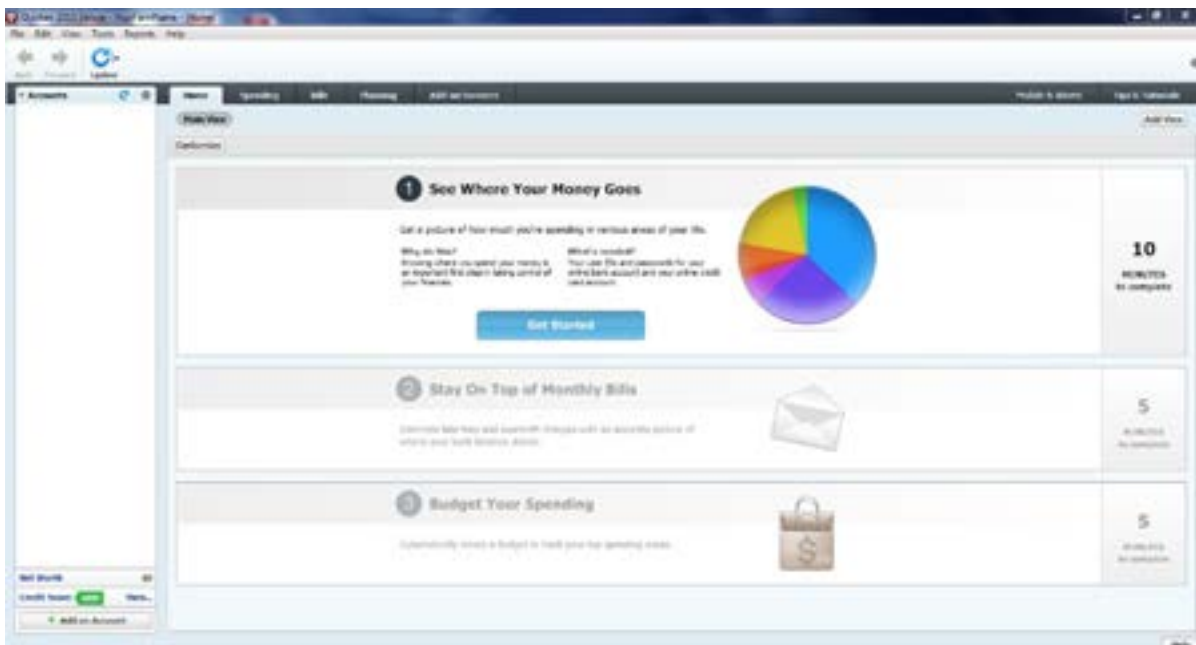
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The next window that appears will be the **Quicken Home page** of your Quicken data file.

Notice that YourFarmName is the file name at the very top of the Quicken 2015 Deluxe window. This is a good reminder to you to look if you are switching between Quicken data files to make sure you are working with the correct accounts and transactions.

In later chapters of this bulletin, you will be led through setting up additional accounts, categories, tags, entering data, reports, etc. However, now we'll review some topics that will be the foundation for navigating in Quicken and editing setting and preferences that you might like to customize.



The above graphic is the Quicken Home Page that you should become familiar with some of the navigation options and features.

Main Menu Bar: Using the mouse, move the cursor to the appropriate item in the Main Menu Bar and left-click. To select an item from the menu options, move the cursor to select it. For example, to open a Quicken data file, select File from the main menu and move the cursor to Open Quicken File. Reports can be accessed from the Main Menu Bar as well as View options and preferences.

Toolbar. Toolbar buttons provide quick access to Quicken features that are more often used. Buttons shown are Back and Forward buttons to navigate to previous screens and forward again. Also the One Step Update button to update online banking and information. Buttons can be customized using the “gear icon” on the right hand side of the Toolbar area or right-clicking on the Toolbar area.

Account Bar. The Account Bar is list of accounts that have been added to the Quicken data file that is currently open. At a glance, you can see account balances. The account transaction register can be opened by clicking the name of the account. The account bar has view options that can be customized using the “gear icon” in the upper right corner of the account bar. You can also right-click in the open area of the account bar for other options. You can also right-click on the account name to edit or delete accounts.

Shortcut Tabs. These tabs are quick ways to navigate to different centers of information within Quicken. As you become more familiar with Quicken, you might use this tabs to get a summary of Spending, Bills, Planning, etc.

How Many Quicken Data Files?

If your business is operated as a **sole proprietorship**, combining your business and personal accounts and categories into one file works best. This would include the business and family sharing one checking account and one savings account. With proper use of Quicken categories and tags, reports can separate the business transactions from personal family expenses and income.

If your business is **incorporated or operates as a partnership** where you receive a regular paycheck for your labor and management, you will probably want to set up one data file for the business and one data file for your personal financial information. This would assume that the business has its own bank accounts separate from the family bank accounts. The accounts for the business and family might be at the same banking institution, but have separate account numbers with the bank.



To create another Quicken data file, from the Quicken desktop Main Menu Bar simply click on File

New Quicken File and follow the instructions similar to the Welcome section of this Manual (page 2.3).

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For the **business data file** you may delete all the pre-set family living categories in the *Category List*. This will allow you to import or create the income and expense categories that are best suited for your partnership or corporation.

Upgrading To Quicken 2015

Before you install Quicken 2015, you should make **at least one back-up copy of the data file** you have been using with your earlier version of Quicken. After you have done that, close all your programs, shut down your computer, restart it and install the Quicken 2015 program. Installing Quicken 2015 will uninstall older Quicken versions!

After you have installed Quicken, the Install Wizard will ask if you want to “Check for Quicken Updates”. If you have internet access and plan to do on-line banking you will want to update at this time.

Click Get Update.



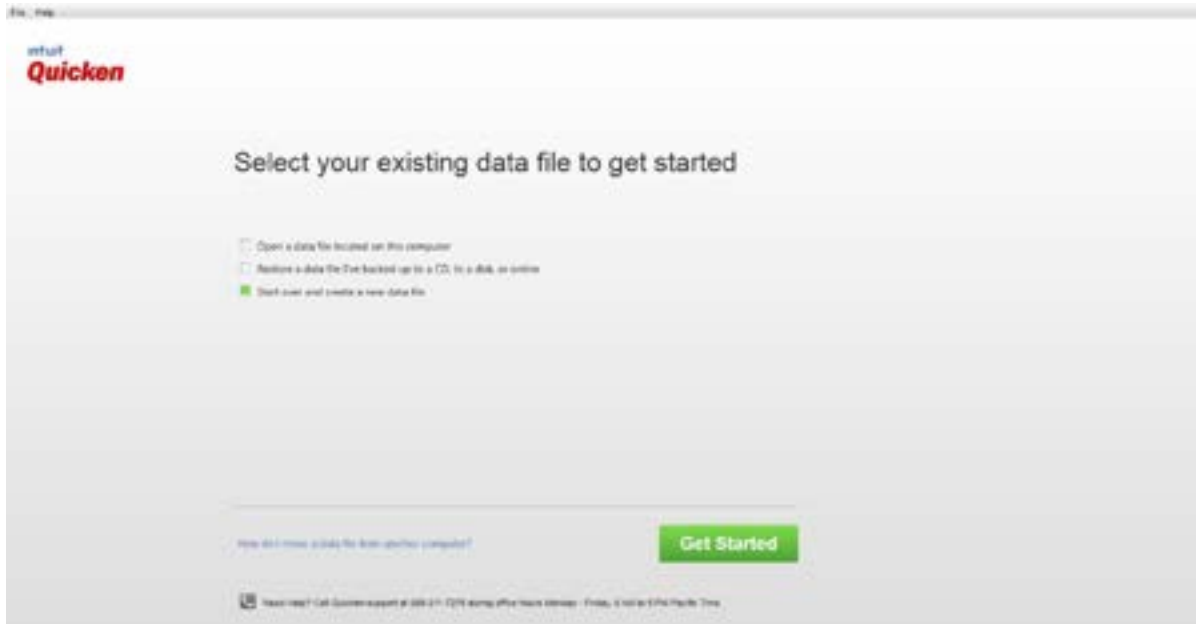
After the update has downloaded,

Click Next in the Quicken 2015 Update Program window to continue on with the program.

Click Next.

Click Finish.

Quicken will ask you to Select Your Existing Data to Get Started with options of Open a Data File Located on the Computer, Restore a Data File I've Backed Up, Or Start Over and Create a New Data File.



Click Open



Navigate to the location of your existing data file and Quicken will Convert the file to Quicken 2015 and save the original data file in a folder called Q14Files in your Quicken folder.

Quicken will indicate “Your data file has been successfully converted.”

Click Next.

Quicken may take you to the Online Banking: Confirm your financial institutions window.

You can enter your financial institutions in this window or simply Click Next if not interested in Online Banking.

Quicken next takes you to *Online Bill Pay: Receive and Pay bills with Quicken Bill Pay*. Complete this information if you plan to pay bills online and Click Next or simply Click Cancel if you aren’t interested.

Quicken now takes you to the *Quicken Home Page*.

Upgrading Quicken 2015 to a New Computer

If you are changing computers and upgrading to Quicken 2015:

Click Restore, a Quicken data file I’ve backed up to a CD or disk in the *Select Your Data File* window.



Click Next to open the *RESTORE QUICKEN FILE* window,

Click OK after selecting the drive where the back-up disk or CD is located.

Click the file to restore and Click OK.

After the file has been successfully restored, go to the menu bar, Click File and Click Open to open the *OPEN QUICKEN FILE* window.

Program Preferences and Options for Quicken 2015



In the menu bar, Click Edit

Click Preferences.

Each option will show the different settings that can be customized. The major preference types and their sub-preferences are shown on the left of the screen.

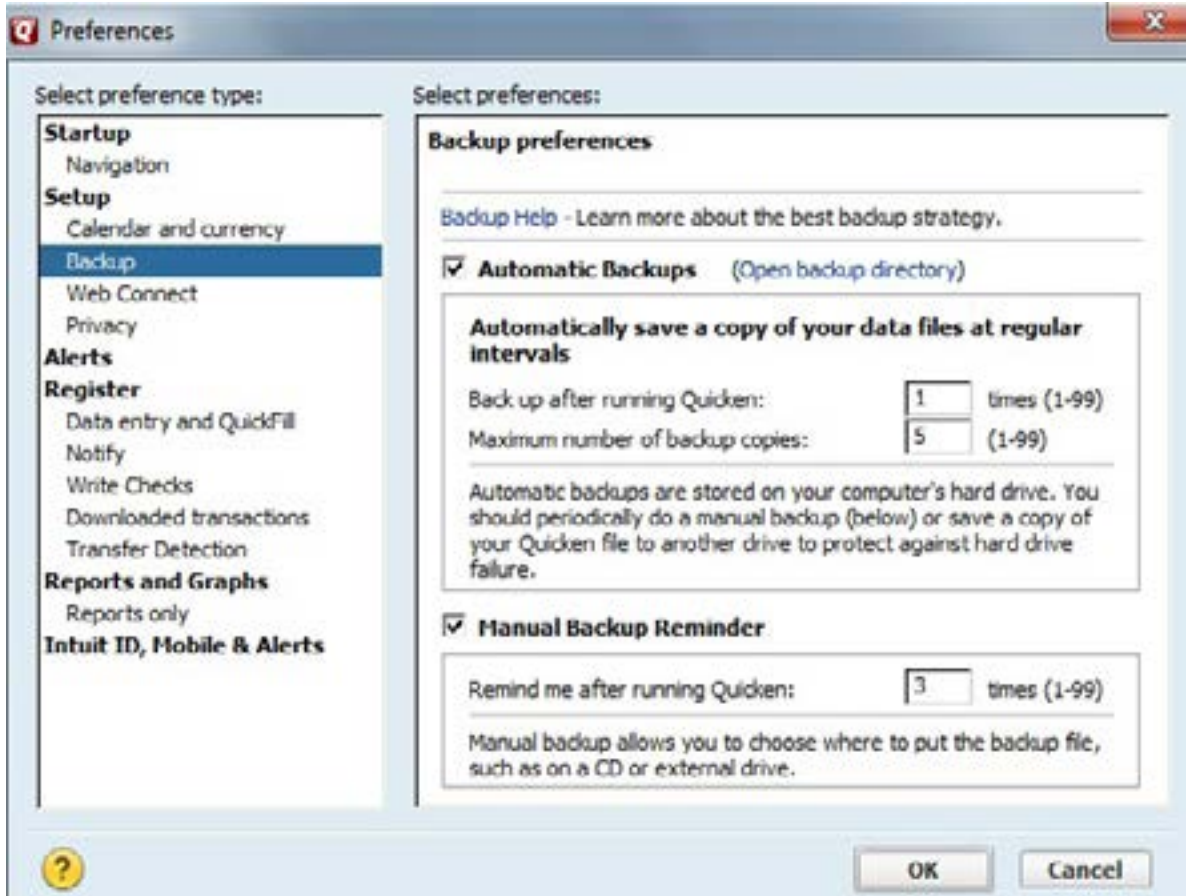
To move from one preference to another, simply Click on the preference you want.

Most of the default settings in Preferences work for most Quicken users. However, a few have been found that may make navigating and entering data easier. The following graphics show the settings we recommend for each of these changes to the default Quicken Preferences. The

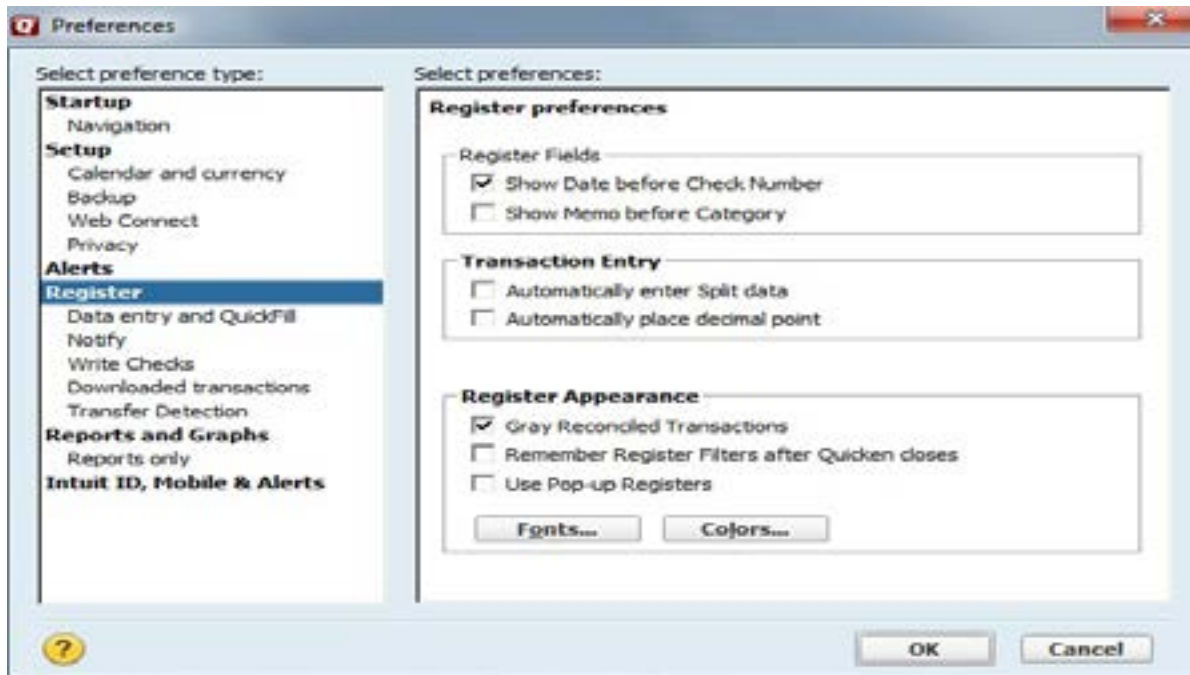
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settings shown are suggestions. After you become familiar with the program and its features, you may want to review these settings and change them to suit your preferences.

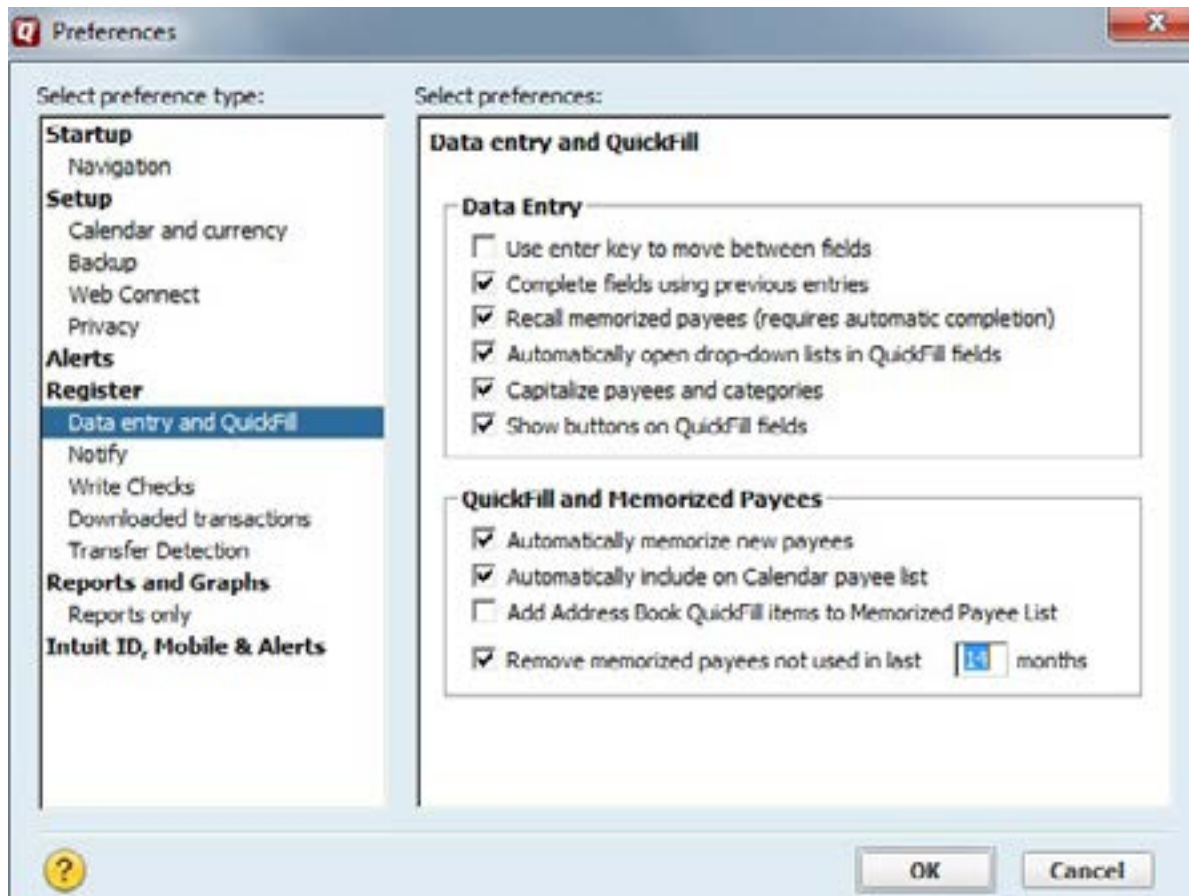
Recommended Settings for Backup



Recommended Settings for Register



Recommended Settings for Data Entry and QuickFill



Note: The quick fill settings are suggestions. Different users have different preferences for these settings. You may want to experiment with these settings to determine which you prefer.

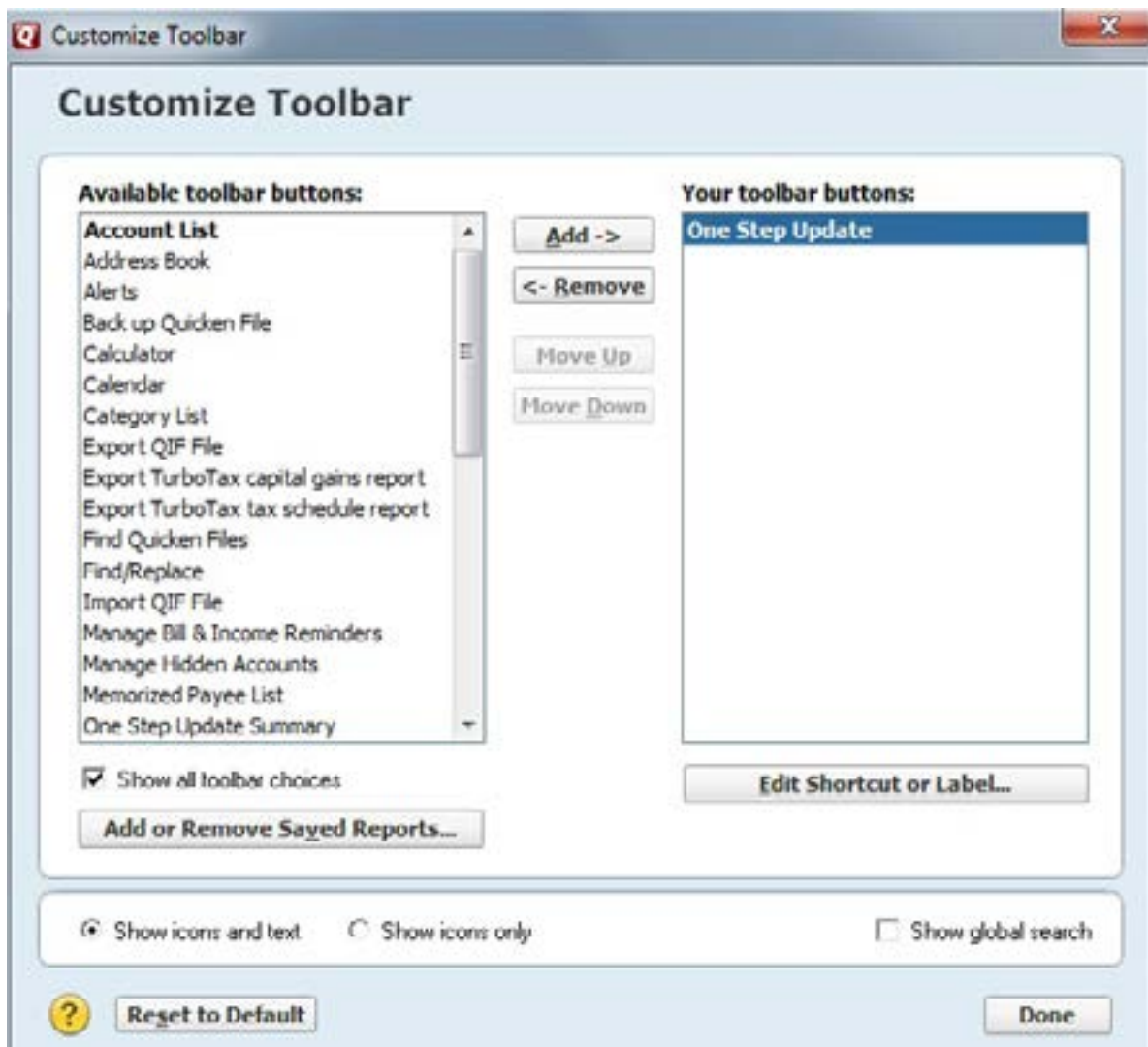
Click OK to close and save the changes made in the *PREFERENCES* window.

Customizing the Toolbar

The main toolbar can be used to access parts of the program without having to use the menu bar.



Right Click the main toolbar to open the *Customize Toolbar window*.



Click on **Show All toolbar choices** at the bottom left of the window to see an expanded list of available options.

Within this window you can add items to the **Your toolbar buttons:** list from the **Available toolbar buttons:** list:

To insert the item into the *Your toolbar buttons:* list, highlight the item you want to add, Click Add.

To remove item(s) from the *Your toolbar buttons:* list, highlight the item in the list, Click Remove.

While items can be added or removed from the *Your toolbar buttons:* list at any time, some of the buttons you might want to consider adding to the *Your toolbar buttons:* are: *Backup, Category List, Tag List, Memorized Payee List, Print Checks* and *Write Checks*. The

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order of the buttons shown on the toolbar can also be changed within this window.

Point and Click on the item in the *Current toolbar order:* list to highlight it and Click Move Up or Click Move Down to change the order.

When you are finished making additions or deletions or changing the order of the buttons,
Click Done to close the *Customize Toolbar* window.

Backing Up Your Quicken Data

It is suggested that you have your program set to “Remind after running Quicken” to **one** time. This setting is shown earlier in this chapter under the *PREFERENCES* window, Setup – Backup preference.

As you exit the Quicken program you will be prompted to backup your data file from the *AUTOMATIC BACKUP* window.



Click Backup to open the *QUICKEN BACKUP* window.

Your Current data file name and Backup file name will be shown in the window.

Check the box *Add date to file name...* to add the present date to your file name.

This will help you identify which file is the latest backup. Your options to backup are ***Back up on my computer or hard drive or Use Quicken Online Backup***. If you are backing up to a CD, hard drive, or USB/thumb drive (removable drive) the destination should be in the box to the left of *Change...*



Is this really necessary? YES!! Although the Quicken program makes an automatic backup copy on your computer's hard drive when you exit, computers sometimes crash, losing all data and programs. A copy of the data on external disks is a safeguard to protect you in case your computer breaks down. It is suggested that you use at least two removable drives, using one set the first time to back up and the second set the next time to backup. Then use the first set of disks the third time and so on. Also, if you are entering a lot of data at one time, you might want to backup your data several times while you are working.

To backup your data file without exiting the program,



Click File, hover down over Backup and Restore.

Hover to the right and Click Back up Quicken File... or press Ctrl+B to open the *QUICKEN BACKUP* window. You can also add Backup to the Toolbar (see Customize Toolbar above).

It only takes one computer crash for you to appreciate the value of backing up your data. Do it frequently!