









Contents

About the Author	iii
Acknowledgments	iv
Introduction	xiii
Conventions Used in This Book	xiv
Chapter 1 Stepping into Quicken	1
 Upgrading Quicken	2
Meet Quicken	2
Determine the Version for You.....	2
Install Quicken 2006	3
Install Quicken for the First Time.....	3
Complete the Installation.....	4
 Viewing the Installation CD.....	5
Get Started with Quicken	5
 Creating a Quick Launch Shortcut	6
Start Quicken	6
Register Quicken	6
Use Quicken Guided Setup	7
 Setting Up a Checking Account Manually	9
Understand the Home Page	13
Find Help	15
 Updating Quicken.....	16
Exit Quicken.....	16
Use Quicken and Windows Basics	17
Recognize Quicken Terms	17
 Finding More Keyboard Shortcuts	20
Use Windows Tools	20
Chapter 2 Making Quicken Yours	23
Customize the Home Page	24
Customize the Tool Bar	25
Change the Account Bar.....	26
Manage Accounts.....	26
 Working with the Activity Center	28
Design a New Home Page View	28
Set Preferences.....	30
Add and Change Accounts	31
Add Cash Flow Accounts	31
Modify Cash Flow Accounts	32
 Adding a Cash Account	33
Use Quicken Online	34
Understand Online Services.....	34
Understand Internet Security.....	35

Set Up Online Banking	35
Deciding to Use Online Banking Services	36
Implement Online Banking	37
Use Quicken Bill Pay	38
Setting Up Web Connect	39
Understand Categories	39
Work with Categories	40
Using Tax-Line Assignments	42
Add an Income Category	42
Renaming a Category	43
Enter Multiple Categories at Once	43
Insert an Expense Category with Subcategories	44
Deleting Categories	45

3

Chapter 3

Setting Up the Other Centers 47


Understand Financial Terminology	47
Use the Investing Center	48
Track Investments	50
Set Up a Standard Brokerage or IRA Account	51
Add a 401(k) or 403(b) Account	53
Using the Ticker Symbol Lookup	54
Creating a Single Mutual Fund Account	56
Use the Property & Debt Center	56
Work with the Property & Debt Center	56
Set Up a House Account with a Mortgage	56
Deleting and Hiding Accounts	59
Add Other Property and Debt Accounts	59
Add Other Liability Accounts	60
Use the EasyStep Loan Wizard	61
Printing an Amortization Schedule	62

4

Chapter 4






Using Quicken Every Day 63

Understand Basic Transactions	63
Establish Preferences for Your Registers	64
Set Register Preferences	64
Determine QuickFill Preferences	66
Set Notify Preferences	67
Set Preferences for Writing Checks	67
Setting Downloaded Transaction Preferences	68
Work with the Register	68
Enter a Check	68
Print Checks with Quicken	71
Entering a Deposit	73
Create a New Transaction Category	73
Changing, Voiding, or Deleting a Transaction	74
Perform Activities with Check Registers	74
Create a Split Transaction	74
Transfer Funds from One Account to Another	76

Locate Transactions	76
Filter Transactions for More Information	77
 Sorting Transactions	78
Attach Digital Images to a Transaction	78
Rate Your Payees	79
Set Up Your Printer and Print a Register	80
Use Other Cash Flow Center Registers	81





Chapter 5 Taking Control with Quicken 83





Memorize Your Entries	83
Create a Memorized Payee	84
 Memorizing from a New Transaction	85
Change Memorized Payees	85
Use Renaming Rules for Downloaded Transactions	85
Create and Memorize a Split Transaction Using Percentages	87
Create a Schedule	87
 Locking a Memorized Payee	88
Understand Scheduled Transactions	88
Find Recurring Transactions	88
Schedule a Transaction with Guided Setup	89
 Understanding Scheduled Transaction Methods	90
Create a Scheduled Transaction	91
Use the Calendar	93
Use the Scheduled Transaction List	95
 Scheduling Online Payments	98
Schedule Your Paycheck	98
Use Reports and Graphs	100
Set Report Preferences	101
 Creating a Mini-Report	103
Create a Standard Report	103
Create a Standard Graph	103

Chapter 6 Tracking Your Assets and Liabilities 107










Work with Asset and Liability Accounts	108
Link an Asset to a Liability Account	108
Adjust the Value of an Asset	109
 Linking Multiple Liability Accounts to One Asset Account	110
 Understanding Depreciation	111
Work with Loans	111
Adjust the Interest Rate on a Loan	111
Handle Other Loan Functions	112
 Making Additional Principal Payments	114
Understand Alerts	116
Set Up Alerts	117
 Deleting an Alert	118
Create Custom Reports	118
Customize an Existing Report	118
Save a Customized Report	121

 Recalling a Saved Report	122
Manage Custom Folders for Saved Reports	122
Create a Net Worth Report	122
Use Quicken Home Inventory	123
Set Options for Quicken Home Inventory	123
Understand Quicken Home Inventory	124
Start a Home Inventory	125
 Protecting Your Inventory Data with Passwords	126
Create and Print Reports in Quicken Home Inventory	126
Send Quicken Home Inventory Data to Quicken	128

7

Chapter 7




Keeping Your Records Up to Date 129

Reconcile Checking and Savings Accounts	130
Reconcile with Your Bank's Paper Statement	130
 Reconciling for the First Time	132
Make Corrections in the Statement Summary Window	132
Deal with Unrecorded Items	133
 Using a Quicken Adjustment	134
Reconcile Online	134
 Activating Automatic Reconciliation	135
Reconcile Credit Card Statements	135
 Finding and Resolving Credit Card Errors	137
Reconcile Investment Accounts	137
Reconcile an Investment Account to a Paper Statement	138
 Updating Prices Manually from a Paper Statement	139
Reconcile a Single Mutual Fund Account	139
Update 401(k) Accounts	140
 Understanding Placeholders in Investment Accounts	142
Reconcile Property & Debt Accounts	142
Update an Asset or Liability Account	143
Watch for Escrow Discrepancies	143
 Using the Find And Replace Dialog Box	144
Prepare for Emergencies	145
Use the Emergency Records Organizer	145
Create Reports in the Emergency Records Organizer	146
Protect Your Data	147

8

Chapter 8

Managing Your Investments 149

 Getting a Quote for a Security	150
Understand the Today's Data Tab	150
Download Quotes	150
Set Up Quicken.com	152
Use Quicken WebEntry	153
 Managing One Step Update	154
Work with Investment Alerts	154
Manage Your Security List	156
 Working with Your Watch List	158

Work with the Analysis Tab	158
Choose Accounts to Analyze.....	158
Working with Your Watch List.....	159
Allocate Your Assets	159
Use the Portfolio Analyzer	163
Estimate Capital Gains	164
Work with the Portfolio Tab	166
Understand Portfolio Terms	166
Customize Your Portfolio View	166
Setting Options in Your Portfolio View	168
Explore the Performance Tab	168
Use the Growth Of \$10,000 Utility	168
Customizing the Date Range.....	169
Filter the Average Annual Return Analysis	169
Use the Performance Research Tools.....	170
Working with a Single Investment Account.....	171

Chapter 9 Making Plans for Your Future 173







Work with Assumptions	174
Understand How to Plan with Quicken	174
Enter Information About Yourself	174
Understanding Your Social Security Retirement Age	176
Enter Income Information and Your Tax Rate	176
Estimating Inflation for Your Plan.....	180
Consider Savings, Investments, and Rate of Return	180
Work with Homes and Other Assets.....	181
Entering Your Expected Rate of Return.....	182
Associating Income with an Asset in Your Plan.....	184
Use the Loans And Debt Planner	185
Figure Your Living Expenses	185
Planning to Pay for College	186
Understand the Plan Results	187
Use the Planners	188
Use the Debt Reduction Planner.....	188
Using What Ifs	191
Use the Calculators, Budgets, and Other Tools	192
Get Quick Answers with Calculators.....	192
Choosing a Financial Service Professional	193
Create a Budget	193
Work with Your Budget	195

Chapter 10 Getting Ready for Tax Time 197



Use the Tax Planner	198
Enter the Tax Planner Options	198
Enter Income into the Tax Planner	199
Using the Tax Line in Categories	200

Enter Interest, Dividend, and Business Income.....	200
Enter Capital Gains.....	201
 Determining the Type of Capital Gain.....	202
Work with Other Income or Losses.....	202
Work with Income Adjustments and Deductions.....	203
 Deducting State Sales Tax.....	205
Update Your Federal Withholdings	206
Work with the Tax Tab	207
 Setting Tax Alerts	208
Assign Tax-Related Expenses and See Your Taxable Income	209
Use the Tools in the Tax Tab	209
 Creating Tax Reports	210
Use TurboTax and Online Tax Tools	210
Explore the Tax Menu	211
Use Tax Menu Items	211
Use the Deduction Finder.....	212
Use the Itemized Deduction Estimator.....	214
Use the Tax Withholding Estimator	216

Index.....	219
------------	-----