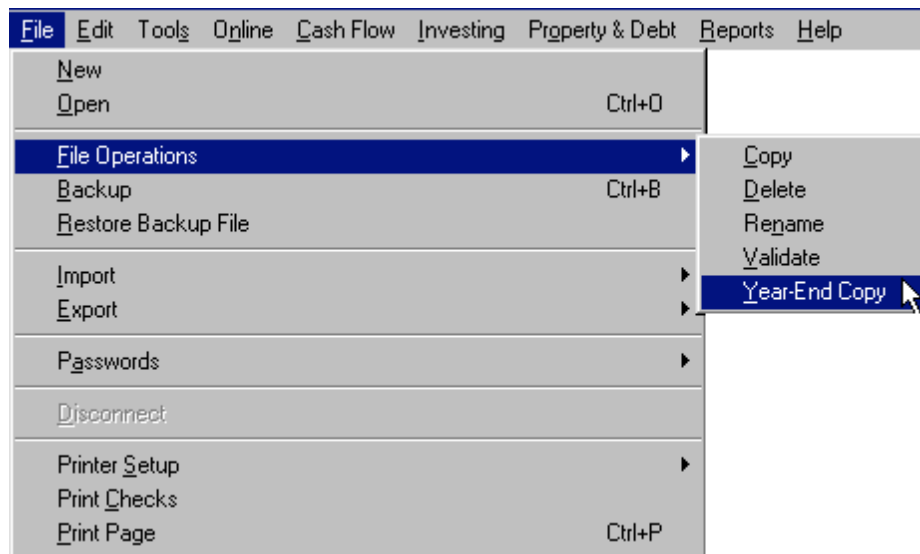

Year End File Management

With the increased capacity and power of today's computers, two years of data or more can easily be kept in the data file while adding the current year's transactions. For instance, data from 2000, 2001, 2002 and 2003 can be kept in the same file while transactions for 2004 are being added. Keeping several years of data in the same file allows you to make comparison reports, graphs, etc. It also makes it easier to go back to find an earlier income or expense transaction. However, at some point you may decide to reduce the number of years of data in your data file.

Make sure that your current file is backed up before beginning any year-end file management.

Three options can be used to manage Quicken data files at year's end. **Click File, Click File Operations, Click Year-End Copy** to open the *YEAR-END COPY* window for two of these options.



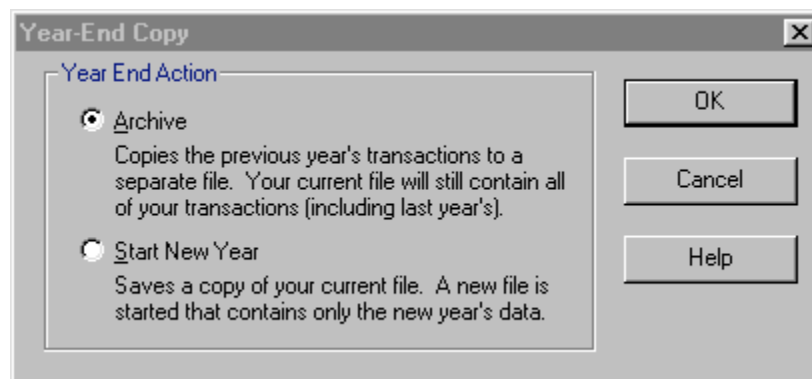
1) Archive

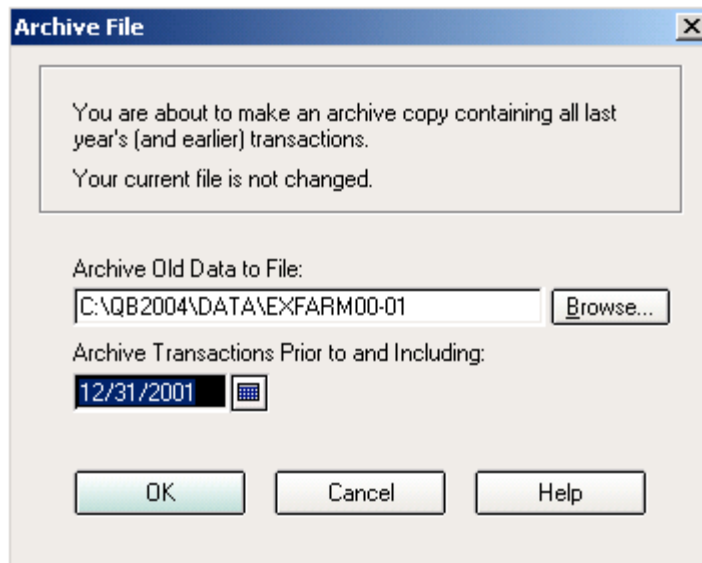
Copies the earlier years' transactions in the current data file to another file. The current file will still contain all transactions including the transactions archived to the new data file. This year-end procedure will allow the user to create a new data file with transactions for a specific year or time period while accumulating several years of transactions in the current data file.

Example of Archive

If the current data file, EXFARM, contains transactions for 2000, 2001, 2002, 2003 and part of 2004, the archive function is set to automatically include transactions up through 12/31/2003 into an archive file named EXFARM03. The program will put EXFARM03 in the same folder containing EXFARM. If you want to name the archive file differently, e.g., EXFARM00-03, to be more descriptive of its contents, you can do this when the *ARCHIVE FILE* window is open. Also, while the *ARCHIVE FILE* window is open you can change the ending date for the transaction to be archived. For example, you want to archive transactions for 2000 and 2001 in a file named EXFARM00-01, you would specify to archive transactions up to and including 12/31/2001. After creating an archived file, EXFARM will still contain the transactions for 2000, 2001, 2002, 2003 and part of 2004. You can continue to use EXFARM for the remainder of your 2004 transactions.

Using the data file, EXFARM, **Archive** cannot be used to create a file that contains 2001 data only. To create EXFARM01 from EXFARM, see **Copy** later in this section.





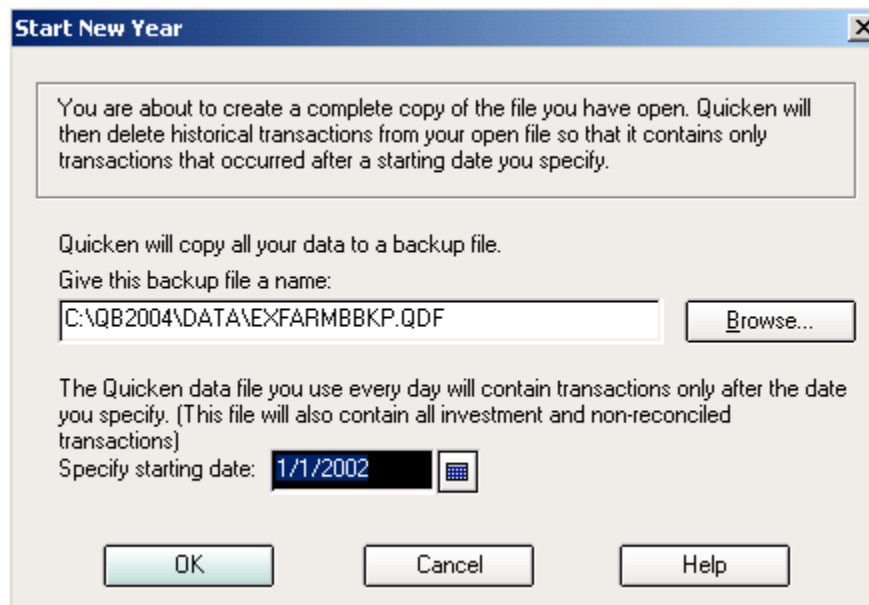
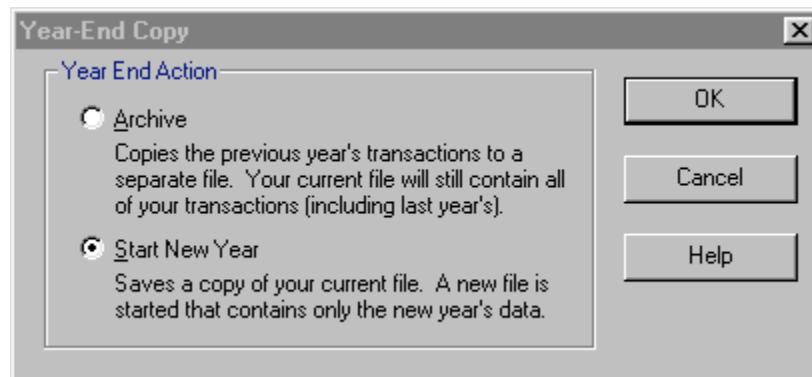
2) Start New Year

This copies all the transactions from the current file to a new backup data file (your file name with BKP.QDF added) and then deletes transactions prior to a specified date from the current file. This procedure can be used to delete old transactions from the current data file when the file contains too many years of records. **Start New Year** should be used to delete transactions from the current data file after those transactions from earlier years have been saved in other data file(s) using **Archive**.

Example of Start New Year

EXFARM now has transactions for 2000, 2001, 2002, 2003 and 2004. You have already archived the 2000 and 2001 data in EXFARM00-01 using the **Archive** option. You want to use **Start New Year** to delete the 2000 and 2001 data from EXFARM so it will contain only 2002 and 2003 transactions as you start recording 2004 transactions. When the *START NEW YEAR* window opens, it will automatically name the backup file EXFARMBKP.QDF and this is where all the transactions from EXFARM will be copied to. If you want to name the backup file something else, the name of the file can be changed here.

The *START NEW YEAR* window also asks about the starting date for transactions to remain in EXFARM. If you want to delete the transactions from 2000 and 2001 so only 2002, 2003 and 2004 transactions remain, you will specify the starting date to be 1/01/02. **Click OK** and EXFARM now has 2002, 2003 and 2004 transactions and EXFARMBKP has 2000 through 2004 transactions. You can delete EXFARMBKP at this point if you want.



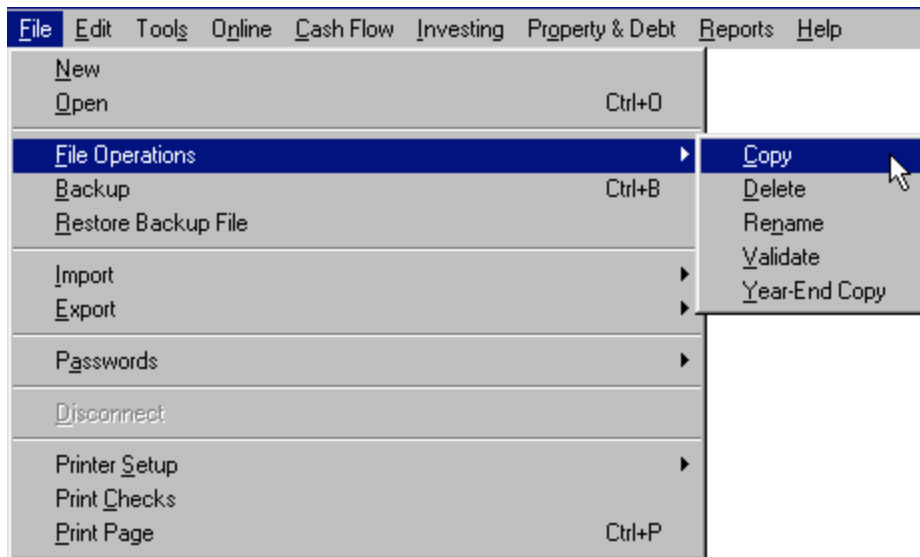
The third option to manage Quicken data files at years end is **Copy**. **Click File, Click File Operations, Click Copy** to open the *COPY FILE* window.

3) Copy

Copy creates a new file with transactions between specified beginning and ending dates. Uncleared transactions should also be copied to the new file.

Example of Copy

If the current data file, EXFARM, contains transactions for 2000, 2001, 2002, 2003 and part of 2004 you can use **Copy** to copy the 2000 and 2001 data into a new file EXFARM00-01. When the *COPY FILE* window opens it will have automatically named the new file EXFARMCopy.QDF so if the file is to be named EXFARM00-01 the name needs to be changed at this point. Be sure to specify the beginning and ending dates of the transactions to be included since **Copy** will automatically set the beginning and ending dates to correspond with the beginning and ending dates in EXFARM. **Copy** can also be used to create files with one year's data, e.g., EXFARM00, EXFARM01, etc. After using Copy, the original file EXFARM will still contain the transactions for 2000, 2001, 2002, 2003 and 2004.



Copy File [X]

Copy the current Quicken file

Specify a disk drive and path to the directory where you want to put the file copy. Include the file name.

C:\QB2004\DATA\EXFARM00-01 [Browse...]

Copy Options

Include Transactions From: 1/1/2000 [Calendar]

To: 12/31/2001 [Calendar]

Include All Prior Uncleared Transactions

Include All Prior Investment Transactions

OK

Cancel

Help