Getting Started

In this chapter, new Quicken users will learn how to create a data folder and a data file. For those users who are upgrading from an earlier version of Quicken, this chapter will go through creating a data folder if needed and copying your old data file to your data folder within Quicken 2005.

And for all users, this chapter will also cover checking and modifying the Quicken 2005 program settings, making modifications to the main toolbar and backing up the data file.

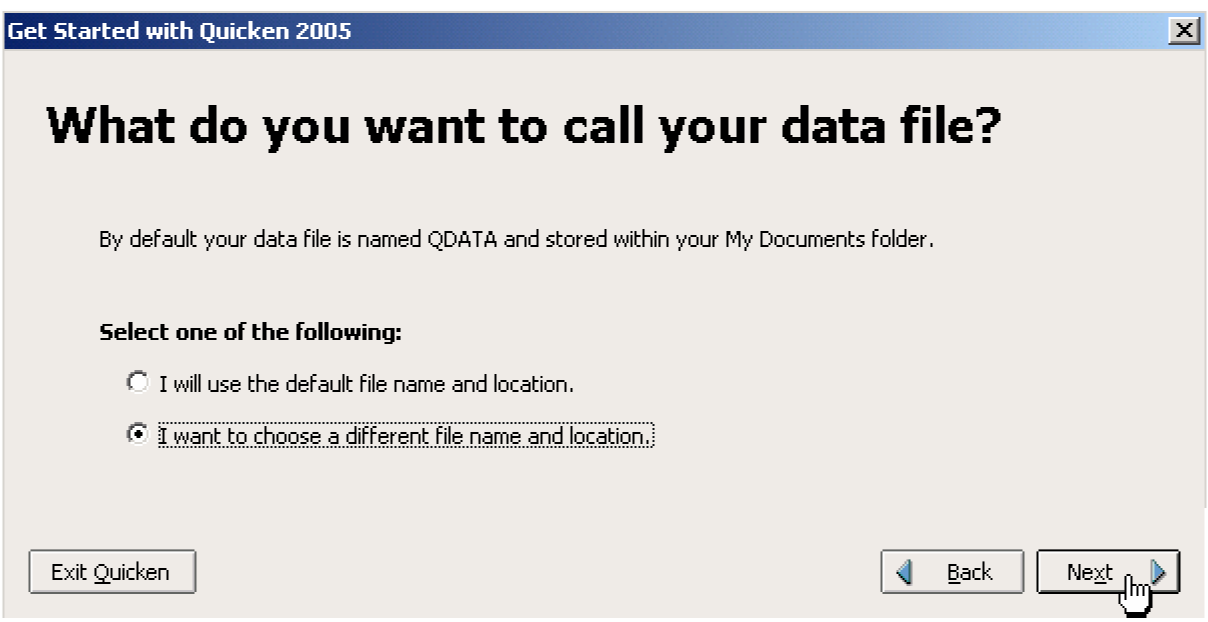
If you are upgrading to a newer version of Quicken from an earlier version, skip the next section and go to the section **Upgrading To Quicken 2005** later in this chapter. For new users, go to the next section.

First Time Into Quicken After Being Loaded Onto Your Computer

After you have installed Quicken, double **Click** the Quicken 2005 icon to begin the program. The program may begin with a message about updating. If you have internet access and plan to do on-line banking you will want to update at this time. After the update is complete **Click Use Quicken Now** to continue on with the program. If you do not have internet access or do not plan to do on-line banking, simply **Click Cancel** to continue with the program. If you do not want the message about updating Quicken upon starting the program, **Click** the box with the message "Never update on Quicken startup again."

The program will continue with an introductory video. You can **Click Quit** anytime during the video. You will them need to double **Click** the Quicken 2005 icon again to re-start the program. The program will then bring up a window with the heading, *WELCOME TO QUICKEN 2005!,* The program wants to know if you are a new user or if you are already a Quicken user. **Click** in the first radio knob to specify that you are new to Quicken 2005 and **Click Next** in the bottom right of the screen.

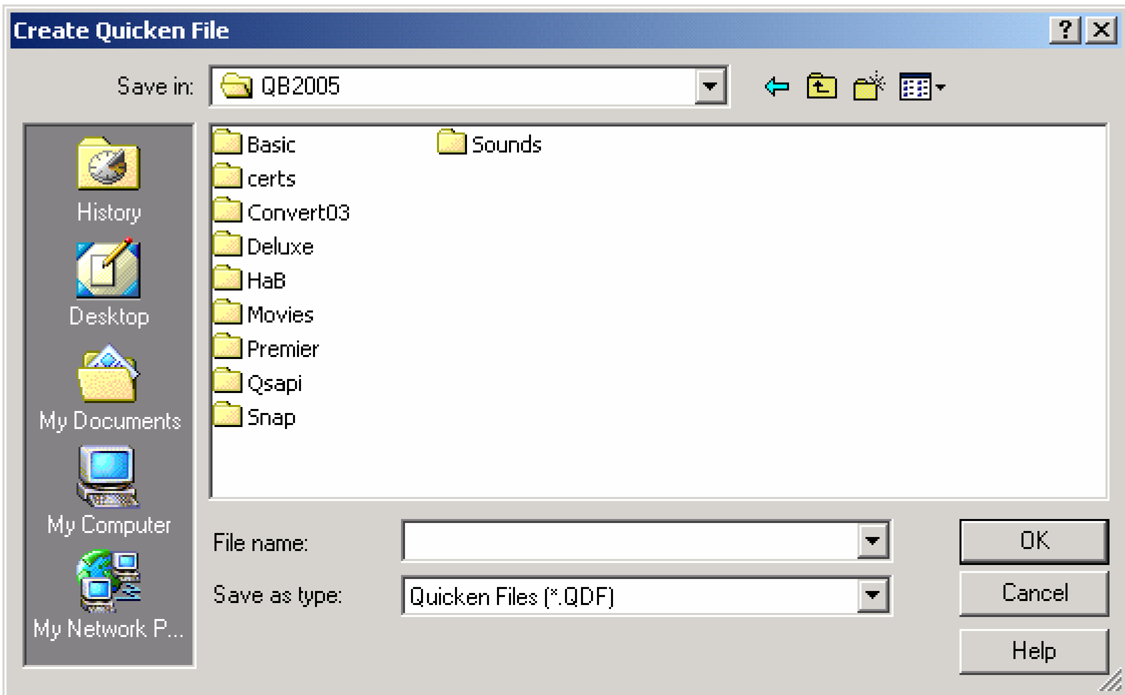
A second window then wants to know “What do you want to call your data file?” and where it will be located. By not using the default name and location, you will able to locate your data file more easily at a later time. **Click** the second radio knob to choose a different file name and location. **Click Next** in the bottom right of the screen. You will now create your data folder and data file.



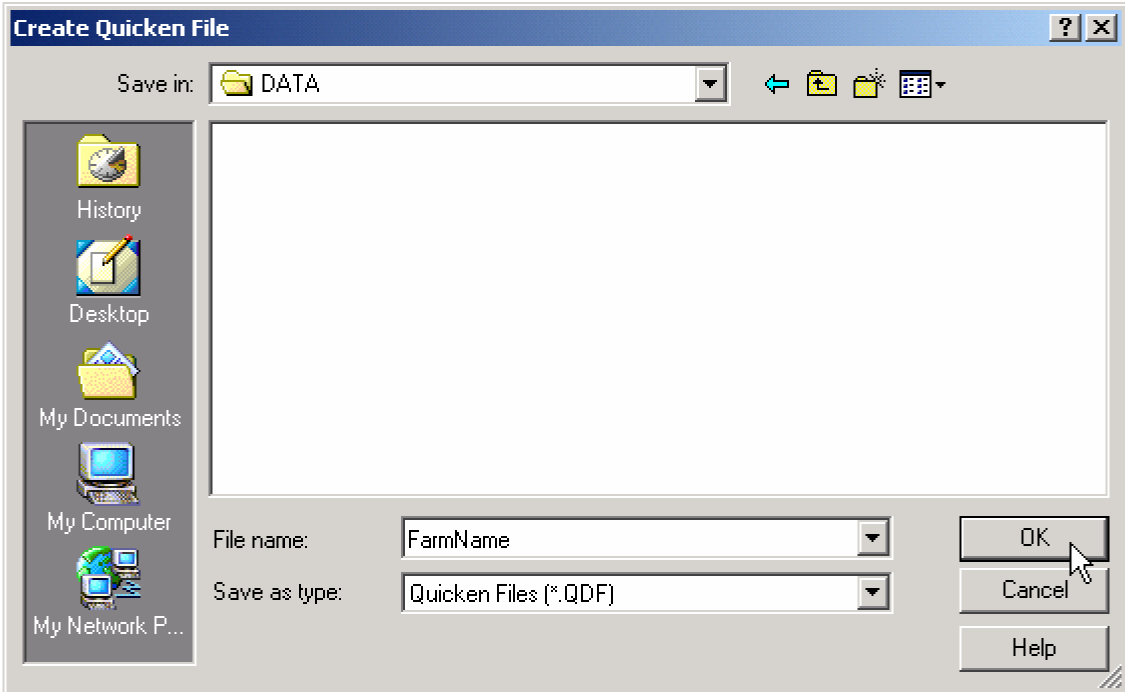
Creating Your First Data Folder and File

The *CREATE QUICKEN FILE* window now opens. The folder appearing in **Save in:** is the folder where Quicken 2005 is located. At this point there are 10 folders within the Quicken 2005 folder.

In the upper right corner of the *CREATE QUICKEN FILE* window, there are four icons.



Point to each icon and a description will drop down. Point to the one that says *CREATE NEW FOLDER* and **Click**. *NEW FOLDER* will appear in the list of folders and will be highlighted. **Type** *DATA* to replace *NEW FOLDER.* **Click off to the side and away from the list of folders**. After *DATA* is one of the folders, **Double Click** on *DATA* folder to put *DATA* in **Save in:**. The *DATA* folder is where the file containing your record data will be saved. Creating and using a *DATA* folder for your data file is not absolutely necessary, but by using a *DATA* folder your data is separate from the program folders and easily located on your computer's C drive.



Click in the blank to the right of **File name:** to get the cursor in the blank. Now 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 OK to close the *CREATE QUICKEN FILE* window. The program will then create your named data file and open the *QUICKEN GUIDED SETUP* window.

Since we will lead you through setting up the program, **Click Exit Setup** in the lower left of the screen. **Click YES** when prompted "Are you sure you want to leave Quicken Guided Setup?" The program will now take you to the *QUICKEN HOME PAGE*.

On the menu bar **Click Tools, Click Category List** to view the categories contained within your data file. When creating a new data file, Quicken creates a file with family living income and expense categories.

While some family living categories are needed to keep track of family finances, there are probably more categories than needed. Since most farms also have off-farm income, the non-farm income categories at the top of the list, listed as **income** under the **type** column, can be left on the list. Examine the family living expense categories to determine if you want to use any of these categories. To delete any family living categories go to the **Deleting Categories** section of the **Categories and Classes** chapter for instructions.

One category on the list that should definitely be deleted is the category "Cash." We will create a Cash Account later that will be used to track cash income received and expenses paid by cash. Keeping "Cash" as an expense category creates confusion.

Deleting a Data File

If you make a mistake setting up your data file, the mistake can easily be corrected. The correction in most cases is to simply delete the file and start over.

To delete your file, go to the menu bar and **Click File, Click File Operations, Click Delete** to open the *DELETE QUICKEN FILE* window. **Click** on your file name and **Click OK.** Quicken will prompt you several times to make sure that you want to delete the file. After the file is deleted, go to the menu bar and **Click File, Click New** to start the process again.

If you make a mistake in the beginning, don't become discouraged. It is easier to correct the mistake early in the process than to wait until you have several months of financial transactions entered and then wish you had set up your data file differently.

How Many Files?

If your business is operated as a sole proprietorship, combining your business and personal accounts and categories into one file works best.

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 date file for your personal financial information. To create another file, simply follow the instructions in **Creating Your First Data Folder and File.**

For the business data file you will need to delete all the categories in the **Category List**. This will allow you to create the income and expense categories that are best suited for your partnership or corporation.

Upgrading To Quicken 2005

Before you install Quicken 2005, 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 2005 program.

After you have installed Quicken, double **Click** the Quicken 2005 icon to begin the program. The program may begin with a message about updating. If you have internet access and plan to do on-line banking you will want to update at this time. After the update is complete **Click Use Quicken Now** to continue on with the program. If you do not have internet access or do not plan to do on-line banking, simply **Click Cancel** to continue with the program. If you do not want the message about updating Quicken upon starting the program, **Click** the box with the message "Never update on Quicken startup again."

The program will continue with an introductory video. You can **Click Quit** anytime during the video. You will then need to double **Click** the Quicken 2005 icon again to re-start the program.

Once the program starts it will open the *WELCOME TO QUICKEN 2005!* window. **Click** on the second radio knob that you are already a Quicken user, **Click Next** and the *SELECT YOUR DATA FILE* window shown below will open.

Which option you choose in the *SELECT YOUR DATA FILE* window will depend on whether you are changing computers along with upgrading to Quicken 2005. Go to the **Upgrading Only** section or the **Upgrading and Changing Computers** section depending on your situation.

Upgrading Only

If you are not changing computers, but only upgrading to Quicken 2005, **Click** the first radio knob to open a file that is located on your computer. **Click Next** and the program will open the *OPEN QUICKEN FILE* window. The folder shown in **Look In:** will be the location where your file was opened from the last time you used your old Quicken program.

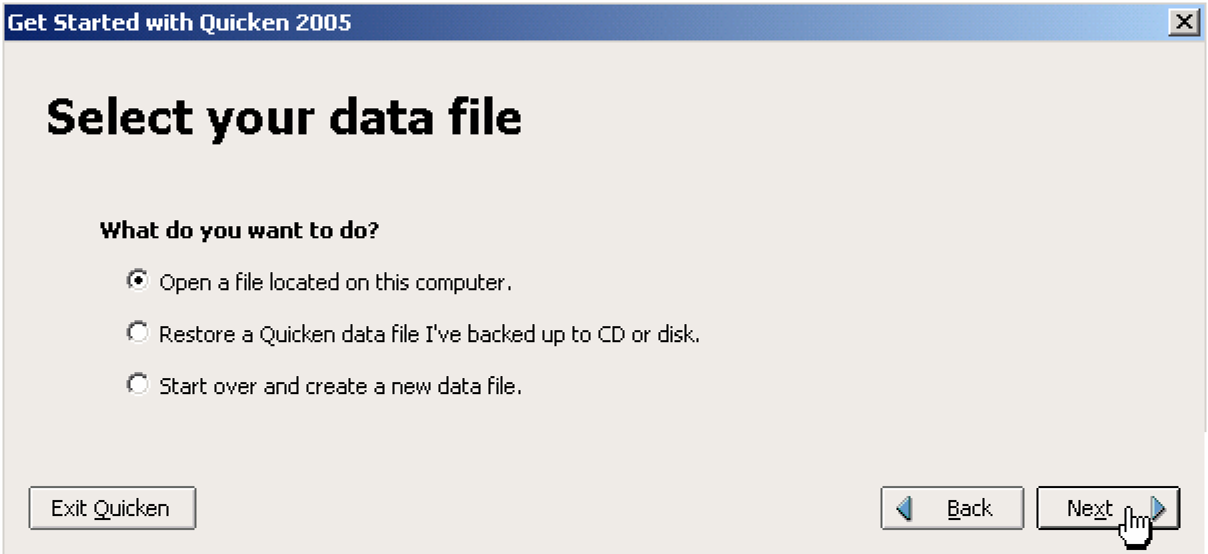
Because the program will not automatically move your data file to the location of your new Quicken program, we recommend you move your file using **Copy/Paste** (or **Cut/Paste**) rather than opening it at this point. Point at your data file name, **Right Click** to open the drop down menu and **Left Click** on **Copy**. Change the folder in the **Look In:** window to the folder where your Quicken 2005 program is located.

Once you have the Quicken 2005 folder in the **Look In:** window you should see 10 different folders. Before you paste your data file to this location, we recommend you create another folder, called *DATA*, following the instructions in the **Creating Your First Data Folder and File** section earlier in this chapter.

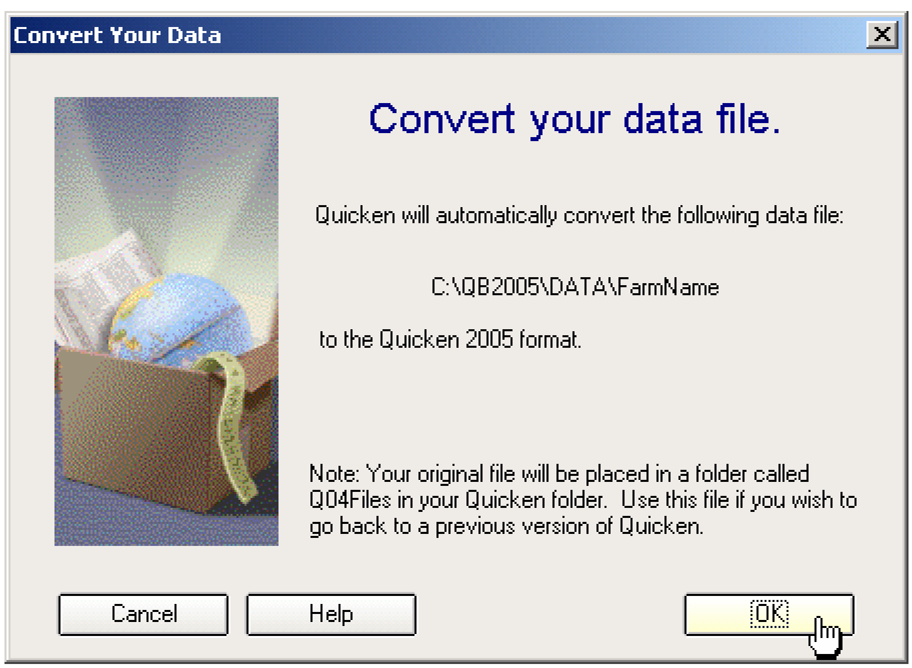
After creating the *DATA* folder, **Double Click** on the *DATA* folder to open it. **Right Click** and **Left Click Paste** to put your data file into the *DATA* folder. **Click OK** within the *OPEN QUICKEN FILE* window to open the *CONVERT YOUR DATA* FILE window. Go to the **Completing the Conversion to Quicken 2005** section.

Upgrading and Changing Computers

If you are changing computers and upgrading to Quicken 2005, **Click** the second radio knob in the *SELECT YOUR DATA FILE* window to restore your data from a CD or disks. **Click Next** to open the *SELECT RESTORE DRIVE* window, **Click OK** after selecting the drive where the back-up disk or CD is located. After the file has been successfully restored, go to the menu bar, **Click File** and **Click Open** to open the *OPEN QUICKEN FILE* window. You should see the 10 folders and your data file within the Quicken 2005 folder. Before opening the data file, we recommend you create another folder, called *DATA*, following the instructions in the **Creating Your First Data Folder and File** section earlier in this chapter.

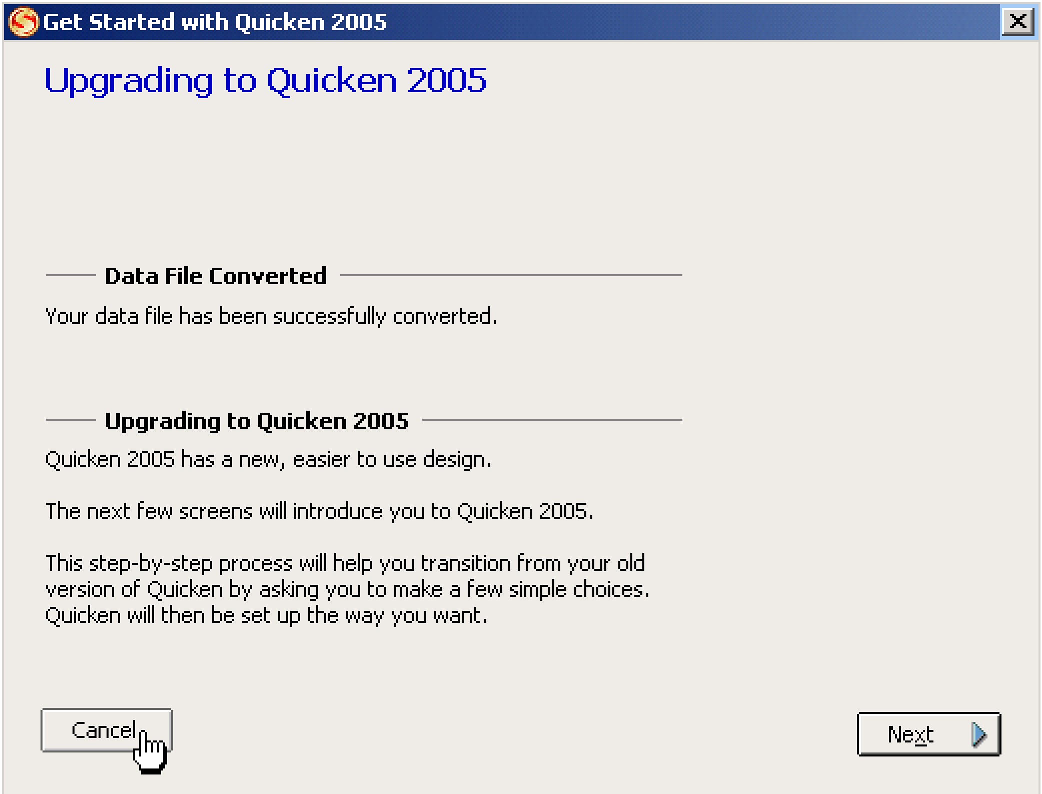


After creating the *DATA* folder, point to the data file, **Right Click** on your mouse to open the drop down menu and **Click Cut**, then point and **Double Click** on the *DATA* folder to open it. **Right Click** and **Left Click Paste** to put your data file in the *DATA* folder. **Click OK** within the *OPEN QUICKEN FILE* window to open the *CONVERT YOUR DATA* FILE window.



Completing the Conversion to Quicken 2005

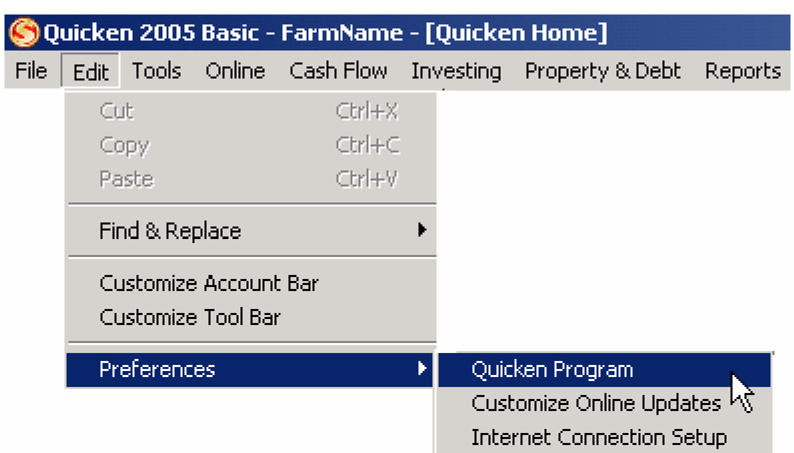
Click OK to begin the process of converting your data into the Quicken 2005 format. After the conversion is completed, the *Upgrading to Quicken 2005* window opens.



Click Cancel in the lower left corner of the window and **Click Yes** when prompted to make sure you want to leave the setup. The program now opens up the *QUICKEN HOME PAGE*.

Program Option Settings for Quicken 2005

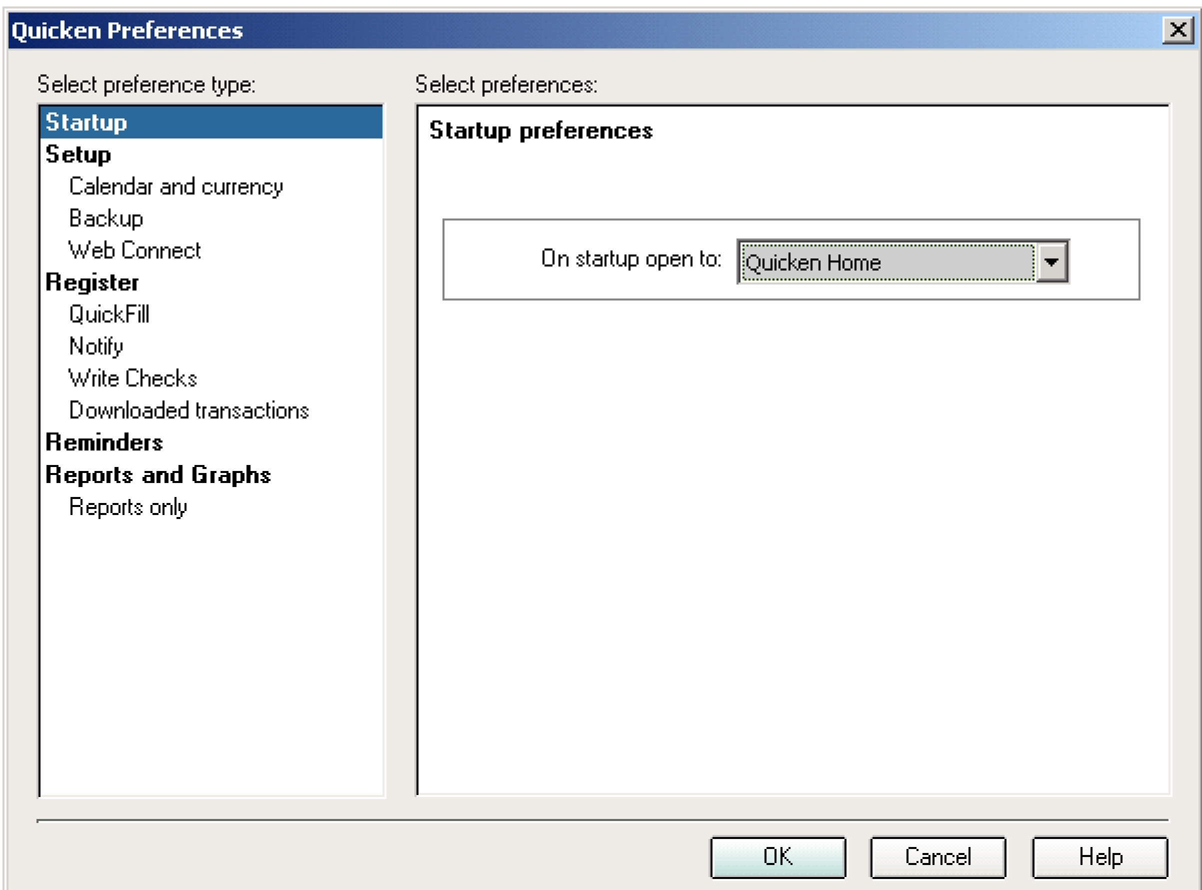
In the menu bar, **Click Edit** and point to **Preferences** to open the drop down window containing the following options: **Quicken Program, Customize Online Updates** and **Internet Connection Setup.** Each option will show the different settings that can be customized.



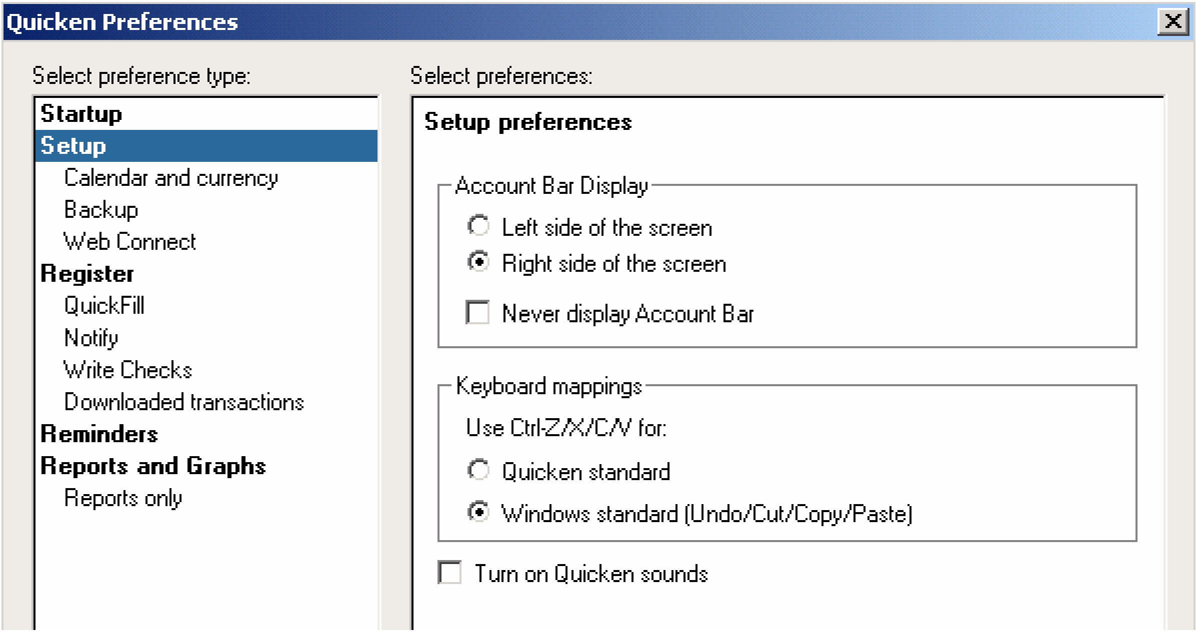
Click Quicken Program to open the *QUICKEN PREFERENCES* window. The major preference types and their sub-preferences are shown on the left of the screen. To move from one preference to another, simply **Click** on the preference you want.

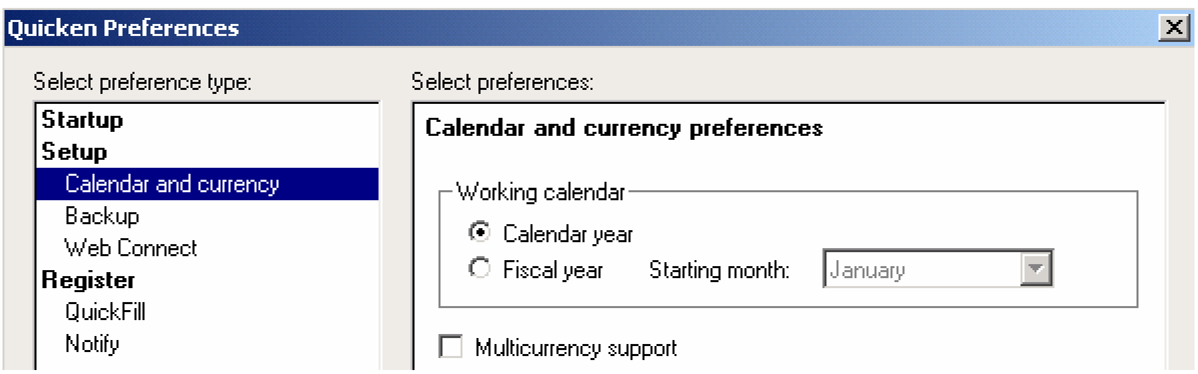
The following graphics show the settings we recommend for each of these. Since we are not using any on-line connections with Quicken, we do not cover the sub-preference, *Web Connect or Download Transactions*. The settings shown are our suggestions. After you become familiar with the program and its features, you may want to review these settings and change them to suit your preferences.

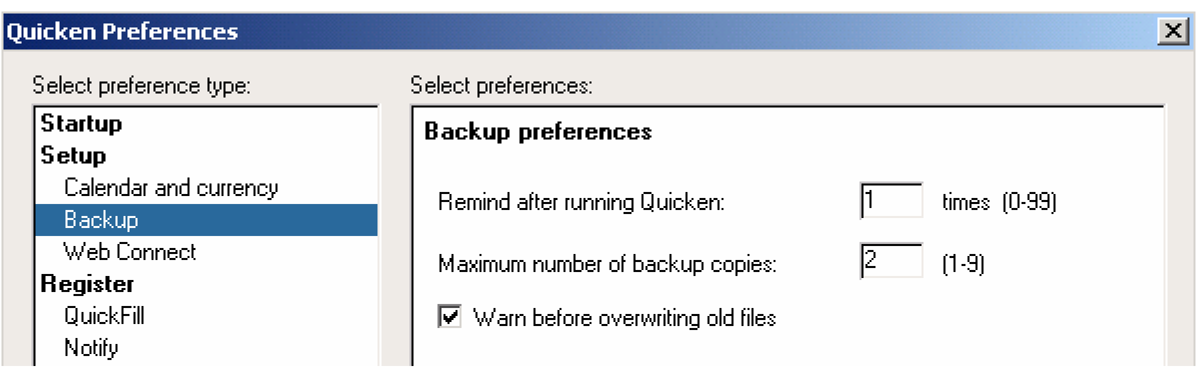
Startup



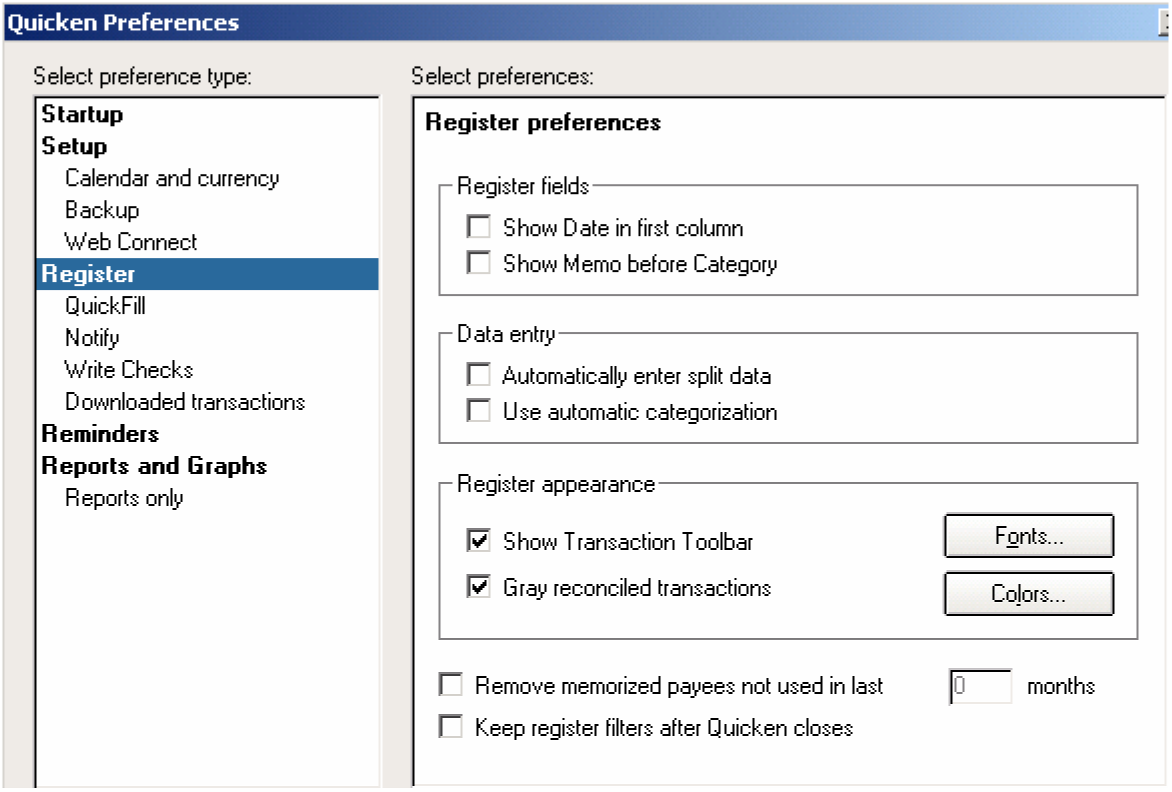
Setup

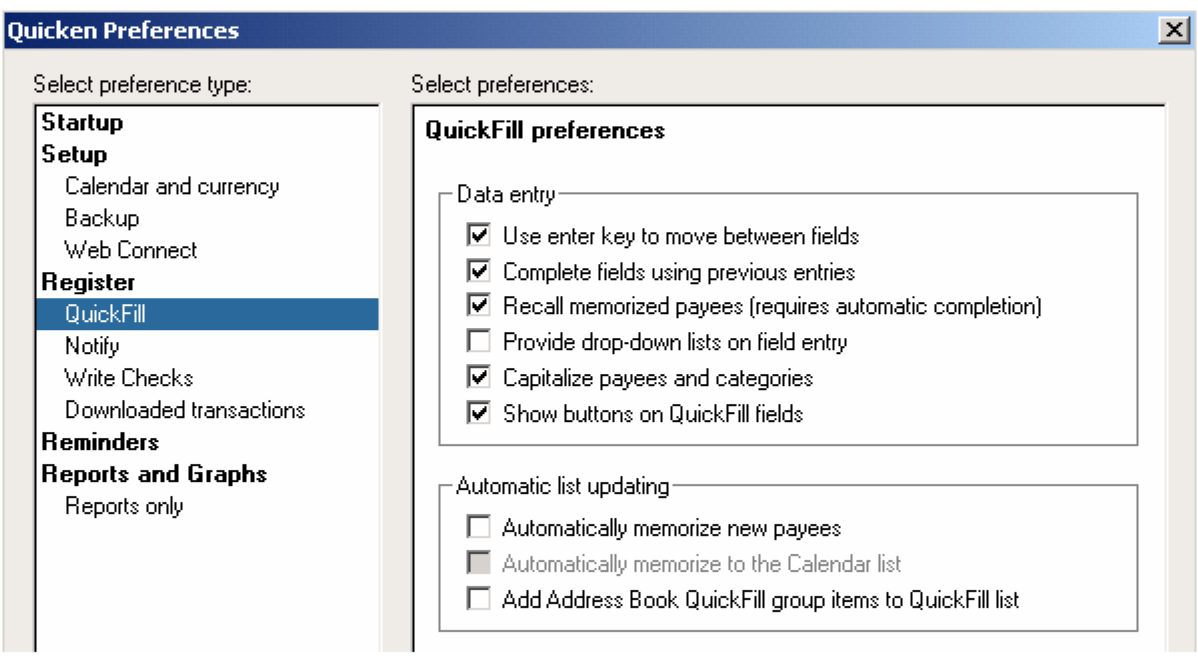

Quicken Preferences
Select preference type:
Startup
Setup
Calendar and currency
Backup
Web Connect
Register
QuickFill
Notify
Write Checks
Downloaded transactions
Reminders
Reports and Graphs
Reports only
Select preferences:
Setup preferences
Account Bar Display
Left side of the screen
Right side of the screen
Never display Account Bar
Keyboard mappings
Use Ctrl-Z/X/C/V for:
Quicken standard
Windows standard (Undo/Cut/Copy/Paste)
Turn on Quicken sounds


Quicken Preferences
Select preference type:
Startup
Setup
Calendar and currency
Backup
Web Connect
Register
QuickFill
Notify
Select preferences:
Calendar and currency preferences
Working calendar
Calendar year
Fiscal year
Starting month:
January
Multicurrency support

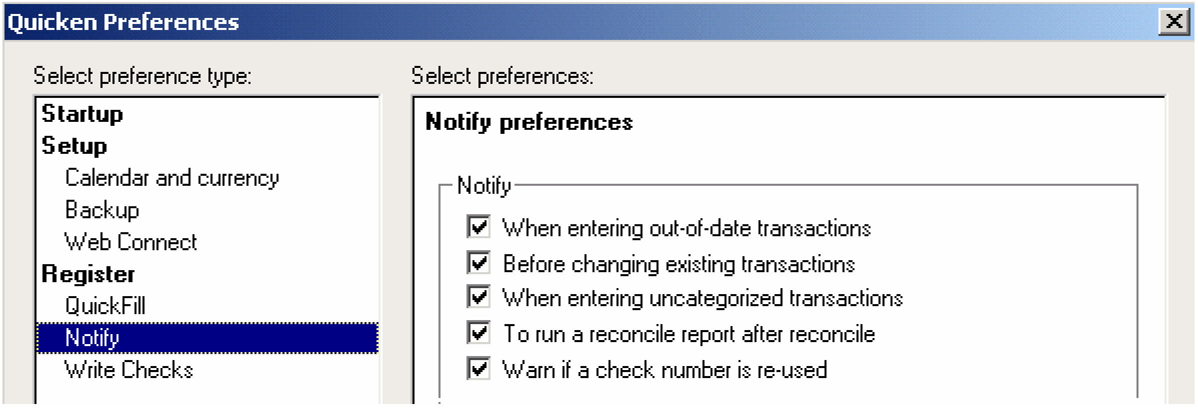

Quicken Preferences
Select preference type:
Startup
Setup
Calendar and currency
Backup
Web Connect
Register
QuickFill
Notify
Select preferences:
Backup preferences
Remind after running Quicken:
1
times (0-99)
Maximum number of backup copies:
2
(1-9)
Warn before overwriting old files

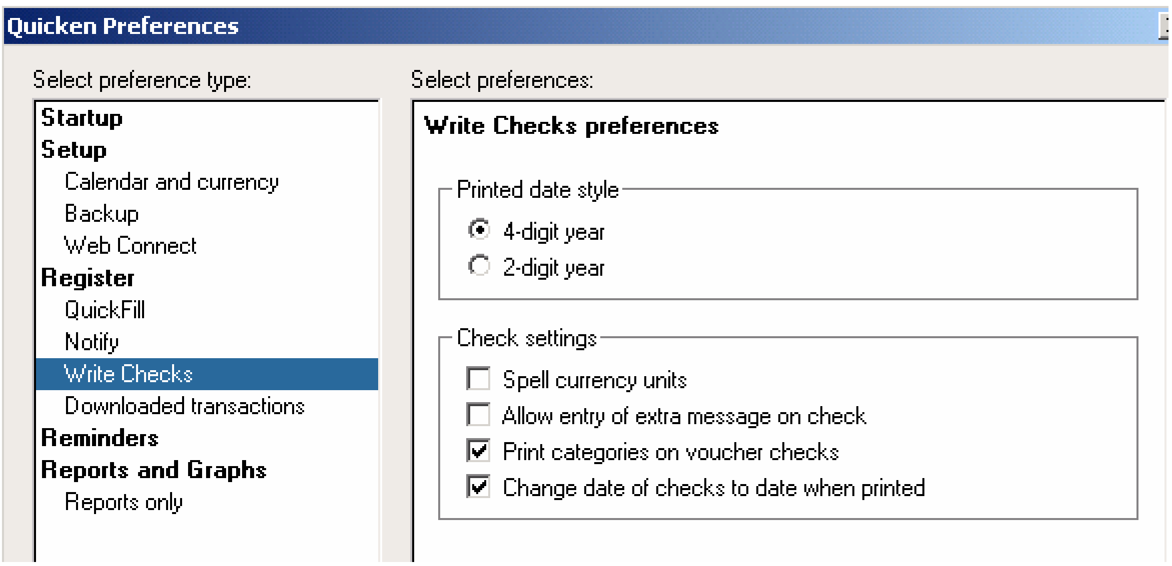
Register



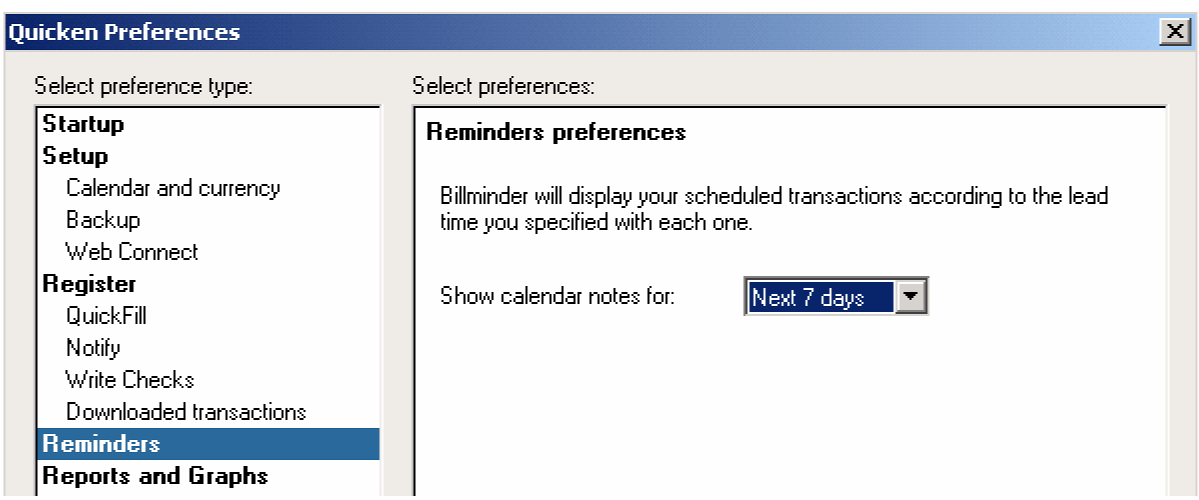


Note: The quick fill settings are suggestions. Different users have different preferences for these settings. You may want to experiment with these settings to determine which you prefer.

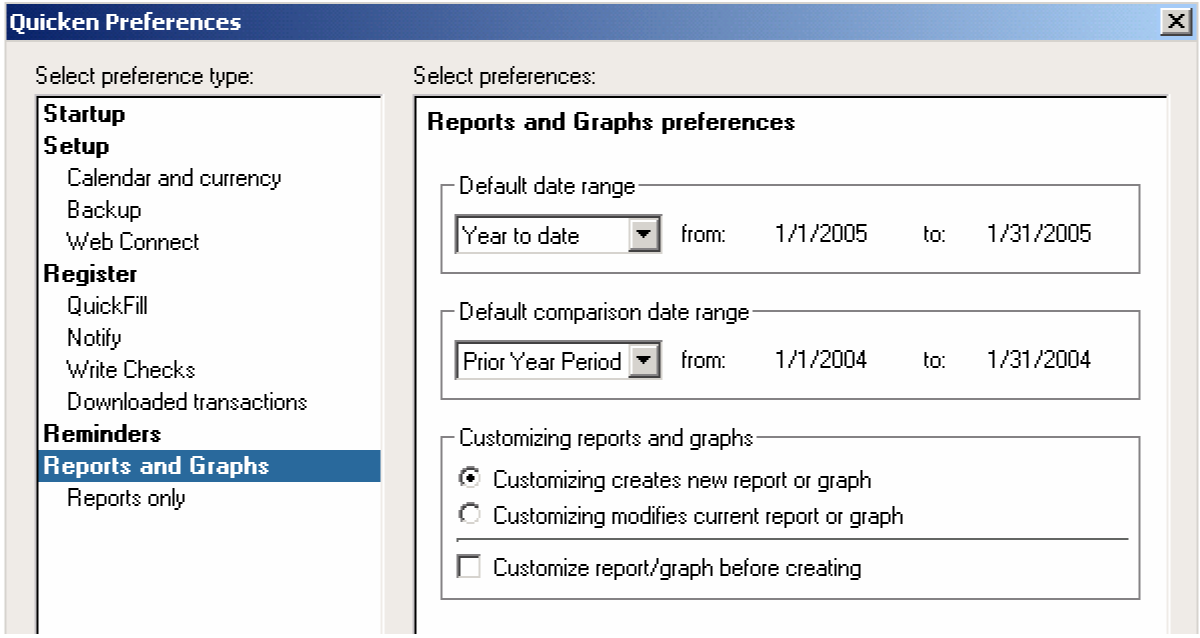

Quicken Preferences
Select preference type:
Startup
Setup
Calendar and currency
Backup
Web Connect
Register
QuickFill
Notify
Write Checks
Select preferences:
Notify preferences
Notify
When entering out-of-date transactions
Before changing existing transactions
When entering uncategorized transactions
To run a reconcile report after reconcile
Warn if a check number is re-used

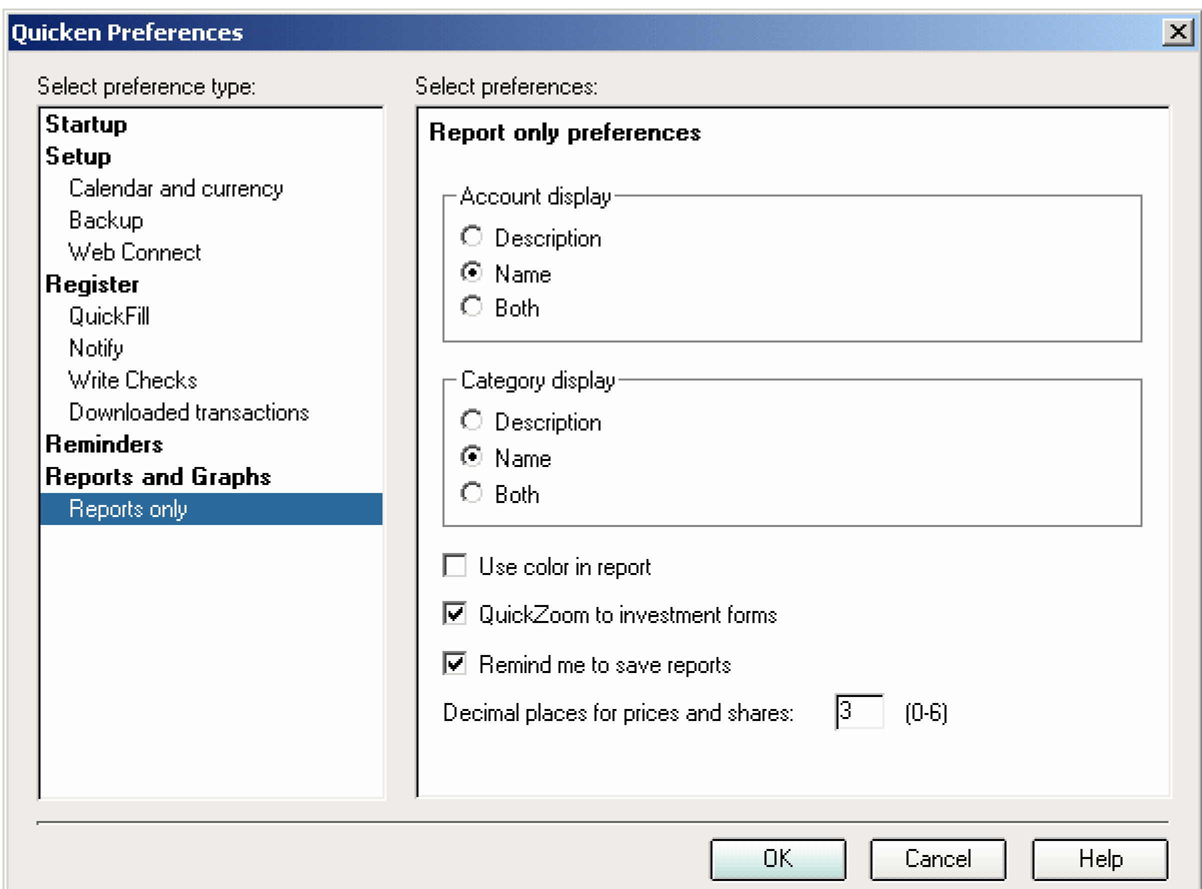

Quicken Preferences
Select preference type:
Startup
Setup
Calendar and currency
Backup
Web Connect
Register
QuickFill
Notify
Write Checks
Downloaded transactions
Reminders
Reports and Graphs
Reports only
Select preferences:
Write Checks preferences
Printed date style
4-digit year
2-digit year
Check settings
Spell currency units
Allow entry of extra message on check
Print categories on voucher checks
Change date of checks to date when printed

Reminders


Quicken Preferences
Select preference type:
Startup
Setup
Calendar and currency
Backup
Web Connect
Register
QuickFill
Notify
Write Checks
Downloaded transactions
Reminders
Reports and Graphs
Select preferences:
Reminders preferences
Billminder will display your scheduled transactions according to the lead time you specified with each one.
Show calendar notes for:
Next 7 days

Reports and Graphs



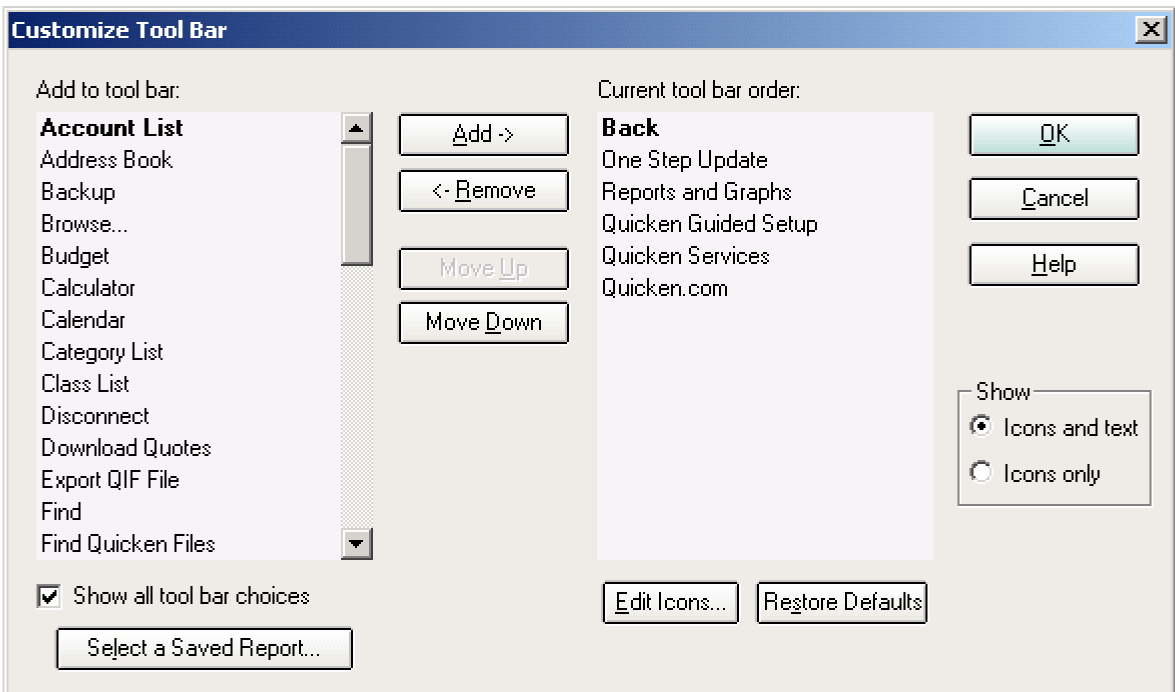


Click OK to close and save the changes made in the *QUICKEN PREFERENCES* window.

Setting Up the Main Toolbar

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

Click the *CUSTOMIZE* button on the main toolbar to open the *CUSTOMIZE TOOL BAR* window. Using the *CUSTOMIZE* button allows easy access to this window to make changes to the toolbar when desired.



Click on *SHOW ALL TOOL BAR 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 *Current Tool Bar:* list from the *Add to Tool Bar:* list by highlighting the item you want to add and **Click Add->** to insert the item into the *Current Tool Bar:* list. Likewise, to remove item(s) from the *Current Tool Bar:* list, highlight the item in the list of, **Click <-Remove** and the item is removed from the list.

While items can be added or removed from the *Current Tool Bar:* list at any time, some of the buttons you might want to consider adding to the *Current Tool Bar* are: *Backup, Category List, Class List, Memorized Payee List, Print Checks* and *Write Checks*. The order of the buttons shown on the toolbar can also be changed within this window. Point and **Click** on the item in the *Current Tool Bar:* 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 OK** to close the *CUSTOMIZE TOOL BAR* window.

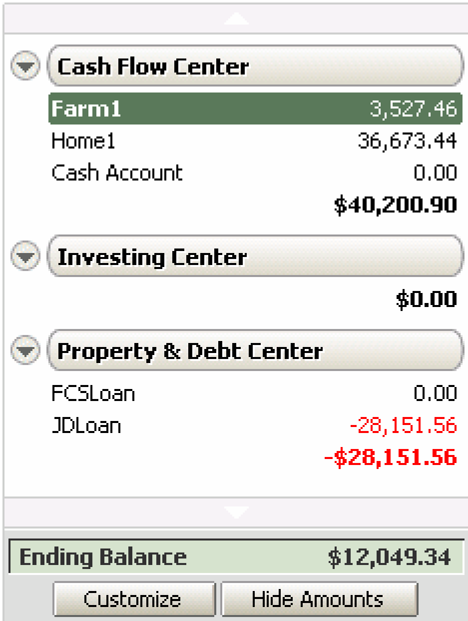
Account Bar

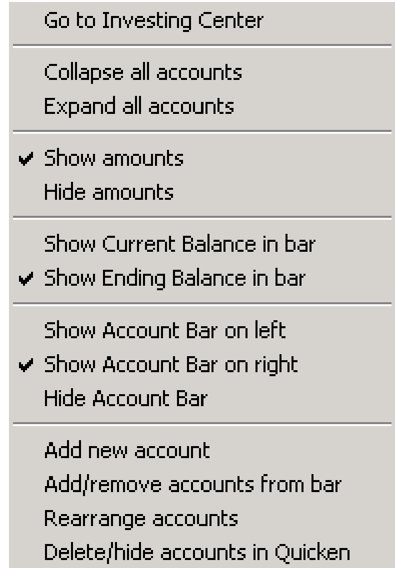
The purpose of the *Account Bar* is to allow you to move from account register (checking, cash, etc.) to account register easily. The program has three categories within the *Account Bar*; the *Cash Flow Center*, the *Investing Center* and the *Property & Debt Center*. Every time you create a new account, it is added to one of these centers.

To move from one register to another, just point and **Click** on the register you want. Referring to the graphic on the left of the following page, if you want to move to the Farm1 account, point and **Click** on Farm1 and the Farm1 register will open. Likewise, if you want to check the transactions in the JDLoan account, point and **Click** on JDLoan in the *Property & Debt* Center and the JDLoan register will open. You are able to move from one account to another easily just by pointing and **Click**ing on the various account names listed in the *Account Bar*.

An option at the bottom of the *Account Bar* is the *Hide Amounts* button that hides the account balances. There is also a *Customize* button that allows you to select which accounts will show in the *Bar*, their arrangement, etc.

There are various options available within the *Account Bar*. By pointing and **Right Click**ing on a *Center* name, you get a drop down menu of available options. These options are shown in the graphic on the right on the following page. We would recommend that you change the location of the *Account Bar* to the right side of the screen (the default is the left side). This allows your account register to show from left to right with the *Account Bar* following on the right.

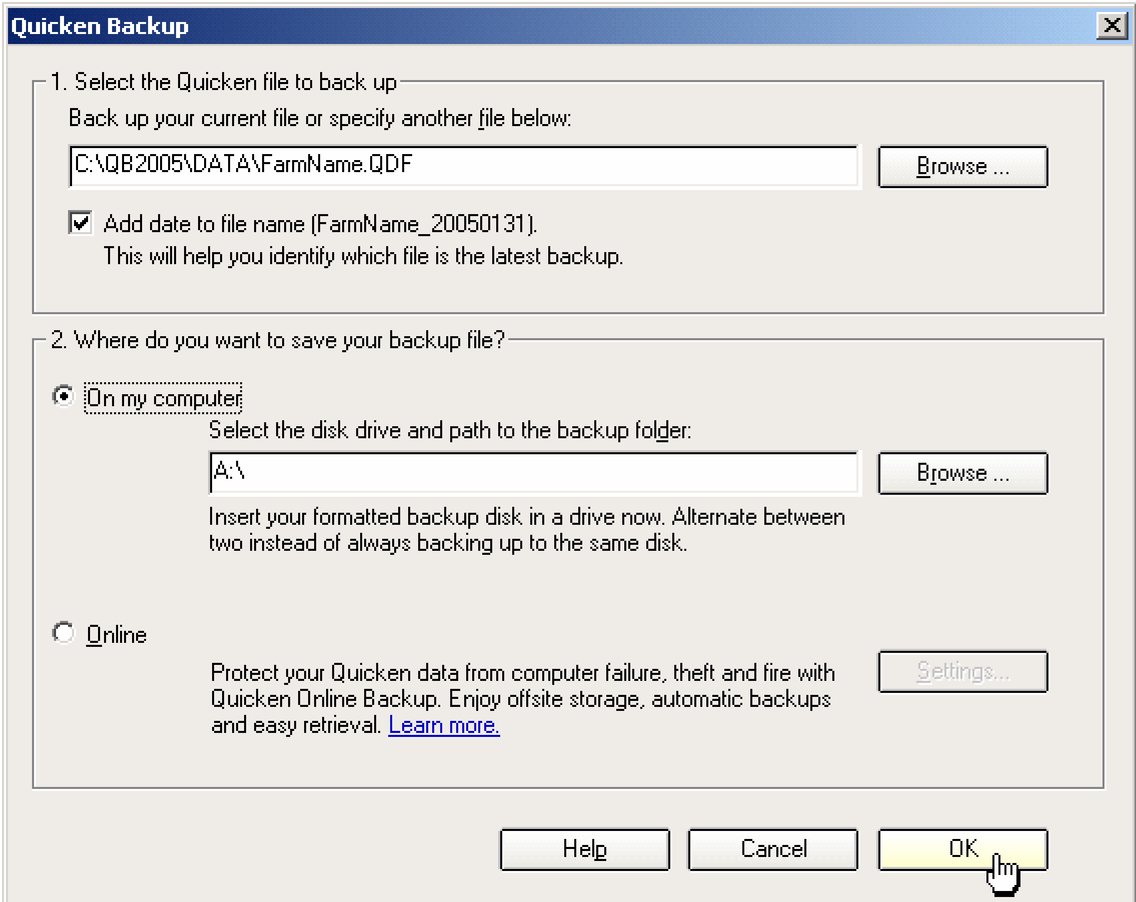




The settings for the *Account Bar* can be changed at anytime. As you become more familiar with the program you may want to change the settings we have suggested.

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 *QUICKEN 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 data file name and its location should come up in *FILE TO BACK UP*. If you are using 3.5” disks to back up your data, **A:** should be in the window under *SELECT THE DISK DRIVE AND PATH TO THE BACKUP FOLDER*. If you are backing up to a CD, you will most likely backup to the **C** drive first and then write from the backup file on the **C** drive to a CD using the software that came with your computer.



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 sets of disks, 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. Quicken 2005 will prompt you to use however many disks are necessary for backing up. 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, Click Backup** or press **Ctrl+B** to open the *QUICKEN BACKUP* window. You can also add **Backup** to the main toolbar (see **Setting Up The Main Toolbar** above). It only takes one computer crash for you to appreciate the value of backing up your data. **Do it frequently!**

Exiting and Re-starting Quicken

You can exit the program several ways; from the menu bar **Click File**, **Click Exit** or **Click** the **X** in the far, upper right corner of your screen.

When you re-start Quicken, it will take you to the *Quicken Home* page. As part of the *Home* page, the *Account Bar* will appear on the screen and you only need to click one of the account names to open the register for that account.

You are now finished with the initial setup of your Quicken program and are ready to move onto the next section.