Customizing Quicken 2006 for Personal Use

Presented by Irene Burt

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Finding Information

Access on the Internet: http://quicken.intuit.com OR http://quicken.com

SCSCC Seminar PDF: http://www.scscc.com/smnr

Acrobat file of the Notes "Quicken 2006, Part II"

Customizing Quicken 2006

- Setting Preferences
- Quicken Home Page Views
- Tool Bar
- Account Bar
- Accounts

Setting Preferences – Edit/Preferences/Quicken

The Preferences dialog window allows you to control Quicken's general appearance and operations. Defaults are set when you install Quicken.

Startup Choices

- **Quicken Home (default setting)**
- **Quicken Centers**
- **An account**

Setup Features

- **Account Bar Display**
- **KeyBoard Mapping**
- **Turn on Quicken Sounds**

Special setup features

- **Calendar and Currency**
- **Backup - Automatic**
- **Web Connect**

Setting Preferences – Edit/Preferences/Quicken

Investment Transactions Features

Register

- **Fields**
- **Data Entry**
- **Register Appearance**
  - **Fonts and Colors**
- **Special Register Features**
  - **QuickFill**
  - **Notify**
  - **Write Checks**
  - **Downloaded Transactions**

Reminders

Reports and Graphs

Quicken Home Page Views

Create window views with the specific information you use.
Note: You cannot modify or delete the Quicken Home Page View.

Click on Create new View

If creating a new view, type a new name in the View name Box.

Add an Item

Select an item from Available Items
Click Add

Remove an item

Select an item from Chosen Items
Click Remove

Rearrange order of items

Select an item from Chosen items
Click on Move Up or Move Down

Quicken Home Page Views

Switching from One View to Another

Click on the name of view desired.
Note: The Quicken Home page will appear at startup.

Deleting A View

Switch to view you want to delete
Choose Delete This View from the Customize menu
Click Yes in confirmation dialog window

Note: The Home view cannot be deleted

Quicken Toolbar

The toolbar appears at the top of the screen beneath the menu bar. Toolbar buttons offer quick access to Quicken features.

To change the Quicken Toolbar:

Click on the Customize Button OR Edit/Customize Tool Bar

Adding a Button

Select an item from Add to Tool Bar list
Click Add

Note: Add to Tool Bar expands to show more items by selecting Show All Toolbar Choices check box.

Adding a saved report

Click the Select a Saved Report Button
Choose a saved report
Click OK

Note: You can add as many reports as you want. If you add more buttons than can fit, a MORE button appears on the toolbar.

Quicken Toolbar

Removing a Button

Select from Current Tool Bar Order List
Click Remove

Rearranging Buttons

Select item from Current Tool Bar Order List
Click on Move Up or Move Down to change position

Changing the Appearance of Buttons

Icons and Text – Toolbar button and its label
Icons Only – Toolbar button only

Editing Buttons – Select Edit Icons

Change label
Change shortcut

Note: Label changes only appear on the Toolbar, not in list

Quicken Toolbar

Restoring the Default toolbar

If you do not want to keep the changes you have made, click on Restore Defaults button

Managing Toolbar Reports on the Toolbar

Click on Manage Toolbar Reports in Edit/Customize Toolbar
OR
Click on Reports in Menu
Click on Manage Toolbar Reports

Select items you wish to see in the Quicken toolbar
Note: you can select a folder containing more than one report or an individual report.

Quicken Account Bar

Select Tools/Account List or press CTLR-A

Click on Manage Accounts Tab

Hiding an Account

Click in box under Hide in Quicken
Use to remove accounts you no longer use or need to see

Exclude an Account's balance in Totals
Click in box under Don't Include in Totals
Use to exclude balances from any total calculated in Quicken

Removing an Account from the Account Bar

Click in box under Remove from Bar
Use if you do not want an account in the account bar because it is seldom accessed

Changing the Order of Accounts within a group
Select an account
Click on the Move Up or Move Down Buttons

Quicken Account Bar

Changing an Account's Group
- **Select account**
- **Click the Change Group Button**

Quicken Accounts

Select Account

- **Select Overview**
- **Select Account Details**