

:Base quicken.hlp>nav
:Title Quicken Help
:Index Debt Reduction=DBTRED.HLP
:Index Emergency Records Organizer=ERO.HLP
:Index Internet Connection Setup=ICHELP32.HLP
:Index Quicken Help=ERRATA.HLP
:Index Quicken Home Inventory=QHI.HLP
:Index Tax Deduction Finder=dedfindr.hlp
1 Introduction
2 Getting to Help=TASK_GETTING_HELP
2 Using Help once you get to it=TASK_USING_HELP
2 Using QuickTabs=TASK_USEQUICKTABS
2 Choosing menu commands=TASK_CHOOSEMENUCOMMANDS
2 Using shortcut menus=TASK_SHORTCUTS
2 Using the Quicken calculator=MENU_ACT_CALC_REGULAR
2 Registering your software=TASK_REGISTER_SOFTWARE
2 Exiting Quicken=TASK_EXIT
1 How Do I
2 Set up accounts and categories
3 Creating a new account=TASK_SETUPACCT
3 Selecting an account to use=TASK_USEACCT
3 Applying for online services=TASK_ONLINE_APPLY
3 Setting up an account for online services=TASK_ONLINE_SETUP_ACCT
3 Printing the Account list=TASK_PRINT_REPORT
3 Make changes to accounts
4 Changing the name of an account=TASK_EDITACCT
4 Changing the limit of a credit card account=TROUBLE_ACCOUNT_CREDITCARD
4 Deleting an account=TASK_DELETEACCT
4 Hiding an account=TASK_HIDEACCT
4 Providing a file password=TASK_PWD
4 Providing a transaction password=TASK_PWD_TRANS
3 Set up accounts for special purposes
4 Setting up a joint bank account=TROUBLE_ACCOUNT_BANK
4 Setting up a line of credit account=TIPS_LINEOFCREDIT
4 Handling cash balances in my brokerage account=TIPS_CASHMANAGEMENTACCTS
4 Tracking assets purchased through financing=TASK_ASSET_TRACK
4 Track foreign currency
5 Enabling multicurrency support=TASK_ENABLE_MULTICURR
5 Setting up a foreign currency account=TASK_CURRSETACCT
5 Converting existing account to foreign currencies=TASK_CURRCONVERT
5 Transferring money between accounts of different currencies=TASK_CURRTRANSFER
2 Keep my register up to date
3 Enter financial transactions
4 Entering a basic transaction=TASK_ADDTRANS
4 In a checking, savings, or money market account
5 Entering a paycheck=TASK_ENTERPAYCHECK
5 Entering a credit card payment=TASK_CREDITCARDPAY
5 Assigning more than one category=TASK_SPLIT
5 Transferring money to another account=TASK_TRANSFER
5 Transferring money between two online accounts=TASK_TRANSFER_FUNDS
5 Seeing where my cash goes=TASK_ATM
5 Entering a loan payment=TROUBLE_AMORT_MEMLIST
4 In a credit card account
5 Entering a credit card purchase=TASK_CREDITCARD_CHARGE
5 Entering a credit card payment=TASK_RECONCC
5 Entering a cash advance=TASK_CASH_ADVANCE
5 Changing the credit card limit=TROUBLE_ACCOUNT_CREDITCARD

5 Setting up a line of credit or equity account=TIPS_LINEOFCREDIT
4 In a cash account
5 Seeing where my cash goes=TASK_ATM
5 Assigning more than one category=TASK_SPLIT
5 Transferring money to another account=TASK_TRANSFER
4 In an asset account
5 Setting up an account for a house or other asset=TASK_SETUPACCTASSET
5 Updating the value of the asset=TASK_UPDATEASSETLIAB
5 Closing an inactive asset=TASK_CLOSEASSETORLIAB
4 In a liability account
5 Setting up an account for a mortgage or car loan=REF_AMORT2
5 Updating the value of the liability=TASK_UPDATEASSETLIAB
5 Closing an inactive liability=TASK_CLOSEASSETORLIAB
3 Enter data quickly
4 Making choices quickly in register fields=TASK_QFILL_ENTRY
4 Reusing whole transactions by typing in the Payee field=TASK_QFILL_RECALL
4 Using the pop-up calculator=TIP_REG_AMOUNT
4 Using the pop-up calendar=TIP_REG_DATE
4 Recording a transaction from the Financial Calendar=TASK_CALEN_REGISTERREC
4 Memorizing a split transaction with percentages=TASK_MEMOR_SPLITPERCENT
4 Recalling a split transaction with percentages=TASK_RECALL_SPLITPERCENT
4 Manage QuickFill's transactions
5 Adjust individual transactions
6 Keeping the amount from changing=TASK_LOCKUNLOCKTRANS
6 Changing details of a locked transaction=TASK_EDITMEMTRANS
6 Removing names from the Payee list in the register=TASK_DELETEMEMTRANS
6 Removing items from the Financial Calendar's Transaction
list=TROUBLE_CALEN_EDITLIST
6 Printing a copy of this list=TASK_PRINT_REPORT
5 Controlling how QuickFill works
6 Changing how QuickFill works=TASK_PREF_QUICKFILL
6 Letting Quicken memorize transactions=TASK_QFILL_MEMORIZE
5 Using QuickFill if auto memorization is turned off
6 Memorizing a new transaction=TASK_MEMTRANS3
6 Memorizing a transaction that's already in the register=TASK_MEMTRANS2
6 Recalling a memorized transaction=TASK_MEMTRANS4
3 Find my way around
4 Selecting an account to use=TASK_USEACCT
4 Scrolling through the register=TASK_REGISROLL
4 Finding a transaction=TASK_FINDTRANS
4 Going to the other account involved in a transfer=TASK_GOTTRANSFER
4 Change the order of transactions in the register=TASK_REGISORT
3 Make changes to transactions
4 Correcting mistakes=TASK_CHANGETRANS
4 Copying or moving text=TASK_TEXTEDIT
4 Copying a transaction between accounts=TASK_COPYTRANS
4 Changing a split transaction=TASK_REVISESPLIT
4 Deleting a transaction=TASK_DELETETRANS
4 Voiding a transaction=TASK_VOIDTRANS
4 Finding and replacing information in transactions=TASK_REPLACE
4 Recategorizing several transactions=TASK_RECAT
4 Review checks=TASK_REVCHECK
3 Manage the register
4 Showing transactions on one or two lines=TASK_ONELINE
4 Changing the way the register works=TASK_OPTTRANS
4 Changing colors used in the registers=TASK_PREF_COLORS
4 Adding a password to a transaction=TASK_PWD_TRANS

4 Changing or removing a password=TASK_CHANGEPWD_TRANS
3 Look at summaries of the register
4 Seeing a graph of how you spend your money=TASK_QUICKSHOT
4 Reporting on transactions used in a register=TASK_REGISTERREPORT
4 Printing the register=TASK_PRINT_REGISTER
2 Pay my bills
3 Schedule payments for recurring bills
4 Set up a list of bills to pay
5 Scheduling a future transaction=TASK_SCHED_ADDTRANSTOLIST
5 Changing a scheduled transaction=TASK_SCHED_EDITSCHEDTRANSLIST
5 Paying a bill ahead of schedule=TASK_CALENDAR_PAYNOW
5 Deleting a transaction from the list=TASK_SCHED_DELSCHEDTRANSLIST
5 Making a loan payment=TROUBLE_AMORT_MEMLIST
4 Look at bills on a calendar
5 Scheduling regular payments=TASK_SCHED_SCHED1
5 Finding a transaction in the transaction list=QUICKTIPS_CALEN_LOCATE
5 Changing a scheduled transaction=TASK_SCHED_EDITSCHEDTRANSLIST
5 Paying a bill ahead of time=TASK_SCHED_EARLY
5 Deleting a scheduled transaction=TASK_SCHED_DEL
5 Manage the Financial Calendar
6 Recording a transaction from the Calendar=TASK_CALEN_REGISTERREC
6 Looking at the account balances graph=TASK_CALEN_ACCTBAL
6 Changing the font used in the Calendar=TASK_FONT_CALEN
6 Switching the calendar to another date=TASK_SCHED_PREV
6 Adding a note to the Financial Calendar=TASK_SCHED_POSTIT
6 Changing the way the Calendar works=TASK_SCHED_CHANGECALENDARPREFS
6 Printing the Financial Calendar=TASK_PRINTCALENDAR
6 Managing the transaction list=TROUBLE_CALEN_EDITLIST
4 What to do when Quicken reminds me to pay a bill
5 Handling scheduled transactions that are due=TASK_REMINDERS_RECSCHEDED
5 Printing checks that are due=TASK_REMINDERS_PRINTCHKSD
5 Sending online payment instructions that are due=TASK_REMINDERS_SEND_PMT
4 Changing the way Reminders work=TASK_BILLMINDER
4 Group bills together
5 Setting up a group of bills=TASK_SETUPGROUP
5 Entering bills in my register=TASK_USETRANSGRP
5 Changing the group=TASK_CHANGEGRP
5 Deleting the group=TASK_DELETEGROUP
3 Write and print checks
4 Write types of checks
5 Ordering checks to print with Quicken=TASK_ORDERCHECK
5 Filling out a check=TASK_CHECKPRINT
5 Reviewing checks I've written=TASK_REVCHECK
5 Writing postdated checks=TASK_POSTDATE
5 Deleting a check=TASK_DELETETRANS
5 Voiding a check=TASK_VOIDTRANS
4 Print checks
5 Preparing to print checks=TASK_PRINTCHECK_SETUP
5 Adjusting coarse alignment=TASK_PRINTALIGN_CONTINUOUS
5 Adjusting fine alignment=TASK_PRINTALIGN_PAGE
5 Printing checks=TASK_PRINTCHKSD
5 Printing a partial first page of checks=TASK_PRINT_CHK_PARTIAL
5 Reprinting checks=TASK_PRINTCHK_REPRINT
5 Printing duplicate vouchers on a laser
printer=FAQ_PRINT_DUPE_VOUCHER_ON_LASER
4 Change the way check writing works
5 Creating a logo for my checks=TASK_PRINT_CREATELOGO

5 Printing a logo on checks=TASK_CHECKPRINT_LOGO
5 Changing the way Quicken writes checks=TASK_OPCHECK
3 Make loan and credit card payments
4 Making a loan payment=TROUBLE_AMORT_MEMLIST
4 Entering a credit card payment=TASK_RECONCC
2 Track contact information
4 Getting started=HELP_PIM_LIST
4 Adding contact information=HELP_PIM_EDIT_RECORD
4 Editing contact information=TASK_PIM_EDIT_ADDRESS
4 Sorting addresses=help_pim_sort_by
4 Printing lists=task_print_report
4 Printing labels=TASK_PIM_PRT_LABELS
2 Balance my accounts
3 Reconcile my bank account
4 Starting reconciliation=TASK_RECON_START
4 Reconciling my bank statement=TASK_RECONBANK
4 Reconciling an online account=TASK_ONBANK_RECONCILE
3 Break down reconciliation into steps
4 Adding a transaction missing from my Quicken account=TASK_RECONMISSING
4 Changing a transaction to match my statement=TASK_RECONEDIT
4 Printing a reconciliation report=TASK_RECONPRINT
3 If there are differences
4 Correcting differences=C_FIRST_TIME_RECON_OPEN_BAL_IS_OK
4 Adjusting the opening balance of a bank statement=TASK_OPENADJUST
4 Adjusting the register to agree with the account statement=TASK_ACCTADJUST
3 Special situations
4 Reconciling more than one month at a time=TASK_RECON_MULTMONTH
4 Adding earlier transactions to Quicken=TASK_RECON_EARLIER
3 Updating the balances of other types of accounts
4 Reconciling my credit card account and paying the bill=TASK_RECONCC
4 Reconciling my online credit card account=TASK_RECON_ONLINECC
4 Updating the register for a credit card statement=TASK_CCADJUST
4 Matching a cash account's balance to the cash on hand=TASK_MATCHBALCASH
4 Updating the balance of an investment account=TASK_UPDATEBALINV
4 Reconciling a mutual fund account=TASK_RECONMUT
4 Reconciling an investment account=TASK_RECONINV
4 Updating the value of my assets or liabilities=TASK_UPDATEASSETLIAB
2 Use the online financial services
3 Get started
4 Getting information about participating financial institutions=TASK_ONLINE_FIND_FI_INFO
4 Checking for available services and fees=TASK_ONLINE_FIND_FI
4 Visiting a financial institution Web Site=TASK_VISIT_FI_WEBSITE
4 Contact my financial institution about online banking services=TASK_ONLINE_CONTACT_FI
4 Contact my financial institution about online investment tracking=TASK_SPIKE_CONTACT_FI
4 Applying for online financial services=TASK_ONLINE_APPLY
4 Applying for online account access for a credit or charge card=TASK_ONLINE_APPLY_CC
4 Applying for a Quicken Credit Card with online account access=TASK_ONLINE_APPLY_QAC
4 Applying for online payment with the Intuit Online Payment service=TASK_ONLINE_APPLY_IOPS
4 Enabling a Quicken account to use the online financial services=TASK_ONLINE_SETUP_ACCT
3 Connect to download and send account information

4 Checking my latest online account balances=TASK_ONBANK_CURRENT_BAL
4 Downloading my latest transactions=TASK_ONBANK_DOWNLOAD
4 Bringing my payment information up to date=TASK_PMT_INFO_UPDATE
4 Sending instructions to my financial
institution=TASK_ONLINE_SEND_INSTRUCTIONS
4 Changing my PIN=TASK_EB_DLG_CHG_PIN
4 Changing my assigned PIN the first time I connect=TASK_EB_DLG_CHG_ASSIGN_PIN
3 Do online account access tasks
4 Work with downloaded transactions
5 Checking the current balances for my online accounts=TASK_ONBANK_CURRENT_BAL
5 Downloading my latest transactions=TASK_ONBANK_DOWNLOAD
5 Viewing transactions for other financial institutions and/or
accounts=TASK_ONBANK_SEE_OTHER_ACCTS
5 Printing a list of your downloaded transactions=TASK_TXNS_PRINT
5 Reconciling an online account=TASK_ONBANK_RECONCILE
5 Reconciling an online credit card account=TASK_RECON_ONLINECC
4 Compare downloaded transactions and update my register
5 Comparing downloaded transactions and updating my
register=TASK_COMPARE_UPDATE
5 Comparing downloaded credit card transactions and updating my
register=TASK_COMPARE_UPDATE_CC
5 Fixing a transaction that should match=TASK_COMPARE_FIX_TXN
5 Unmatching a transaction=TASK_COMPARE_FIX_BAD_MATCH
5 Deleting a downloaded transaction=TASK_COMPARE_DELETE_TXNS
5 Updating my register in one step=TASK_COMPARE_ACCEPT_ALL
4 Use online account access with a credit card
5 For a Quicken Credit Card
6 Applying for a Quicken Credit Card with online account
access=TASK_ONLINE_APPLY_QAC
6 Enabling a Quicken Credit Card account to use online account
access=TASK_ONLINE_SETUP_ACCT_QAC
6 Downloading Quicken Credit Card transactions=TASK_GET_QAC_DATA
6 Comparing downloaded credit card transactions and updating my
register=TASK_COMPARE_UPDATE_CC
6 Making a payment on your Quicken Credit Card account=TASK_ONBANK_PAYCC_QAC
6 Reconciling an online credit card account=TASK_RECON_ONLINECC
5 For other credit or charge cards
6 Downloading credit or charge card transactions=TASK_CC_DOWNLOAD
6 Comparing downloaded credit card transactions and updating my
register=TASK_COMPARE_UPDATE_CC
6 Making a payment on an online credit card account=TASK_ONBANK_PAYCC
6 Reconciling an online credit card account=TASK_RECON_ONLINECC
4 Transfer money
5 Transferring money from the Online Center Transfers
tab=TASK_TRANSFER_FUNDS_FROM_OLC
5 Transferring money from the register=TASK_TRANSFER_FUNDS_FROM_REG
5 Finding out if an online transfer has been made=TASK_XFERS_COMPLETED
5 Printing a list of online transfers=TASK_XFERS_PRINT
5 Deleting an online transfer instruction=TASK_ONBANK_XFERS_DELETE
3 Use online payment instructions
4 Set up online payee information
5 Setting up a new online payee=TASK_ONPAY_NEW_PAYEE
5 Changing information about an online payee=TASK_ONPAY_EDIT_PAYEE
5 Deleting an online payee=TASK_ONPAY_DELETE_PAYEE
5 Using an online payee to create an online payment
instruction=TASK_ONPAY_USE_PAYEE
5 Creating a report about your online payees=TASK_ONPAY_REPORT_PAYEE

4 Work with online payment instructions
5 Bringing my payment information up to date=TASK_PMT_INFO_UPDATE
5 Creating an online payment instruction on the Payments
tab=TASK_MAKE_POL_PMT_ON_PMT_TAB
5 Creating an online payment instruction in the
register=TASK_MAKE_POL_PMT_IN_REG
5 Creating a repeating online payment instruction=TASK_SETUP_REPEAT_PMT
5 Changing a repeating online payment instruction=TASK_CHANGE_REPEATING
5 Connecting a repeating online payment instruction to a
loan=TASK_AMORTIZE_REPEAT_LOAN
5 Changing the loan payment for a repeating online payment
instruction=TASK_EDIT_LOAN_REPEAT
5 Printing a list of my online payment instructions=TASK_ONPAY_PRINT
4 Inquire about or cancel an online payment instruction
5 Finding out if an online payment has been made=TASK_PMT_INQUIRY
5 Canceling a single online payment instruction=TASK_STOPPAY_SINGLE
5 Canceling one payment in a repeating online payment
instruction=TASK_STOPPAY_SINGLE
5 Deleting a repeating online payment instruction=TASK_STOPPAY_REPEAT
4 Switch between the online payment service and CheckFree
5 Switching from CheckFree to the online payment
service=TASK_SWITCH_FROM_CF_TO_ONPAY
5 Switching from the online payment service to
CheckFree=TASK_SWITCH_FROM_ONPAY_TO_CF
5 Permanently turning off CheckFree=TASK_CANCEL_CHECKFREE
3 Use financial institution e-mail
4 Creating an e-mail message=TASK_EMAIL_CREATE
4 Inquiring about an online payment from the E-mail
tab=TASK_PMT_INQUIRY_BY_EMAIL
4 Reading e-mail=TASK_EMAIL_READ
4 Deleting an e-mail message=TASK_EMAIL_DELETE
4 Printing e-mail=TASK_EMAIL_PRINT
3 Contact my financial institution
4 Getting information about participating financial
institutions=TASK_ONLINE_FIND_FI_INFO
4 Checking for available services and fees=TASK_ONLINE_FIND_FI
4 Visiting a financial institution's Web site=TASK_VISIT_FI_WEBSITE
4 Applying for online financial services=TASK_ONLINE_APPLY
4 Finding a financial institution's phone number=TASK_FI_PHONE
4 Creating an e-mail message to my financial institution=TASK_EMAIL_CREATE
4 Finding out if an online payment has been made=TASK_PMT_INQUIRY
4 Finding out if an online transfer has been made=TASK_XFERS_COMPLETED
4 Canceling an online service=TASK_ONLINE_CANCEL
2 Analyze my financial picture
2 Get the most from reports and graphs
3 Work with categories
4 In transactions
5 Assigning a category to a transaction=TASK_USECAT
5 Assigning more than one category to a transaction=TASK_SPLIT
5 Changing the category of a group of transactions=FAQ_CHANGE CAT
4 Make changes to single categories
5 Setting up a new category=TASK_SETUPCAT
5 Changing a category's definition=TASK_EDITCAT
5 Tracking tax-related expenses=TASK_TAXCATEGORIES
5 Merging two categories=TASK_MERGE CATS
5 Turning a category into a subcategory=TASK_DEMOTECAT
5 Turning a subcategory into a category=TASK_PROMOTESUBCAT

5 Moving a subcategory to a different category=TASK_MOVESUBCAT
5 Deleting categories=TASK_MANAGEDELCAT
4 Adjust groups of categories
5 Adding groups of categories to an existing file=TASK_MANAGECAT
5 Transferring categories to a new file=QUICKTIPS_CATEGORY_TRANSFER
5 Looking at all transactions that use a category=TASK_REPORTCAT
5 Printing a copy of the Category & Transfer list=TASK_PRINT_REPORT
3 Group categories with category groups
4 Setting up category groups=TASK_SETUP_SUPERCATS
4 Assigning categories to category groups=TASK_ASSIGN_SUPERCATS
4 Renaming category groups=TASK_RENAME_SUPERCATS
4 Deleting category groups=TASK_DELETE_SUPERCATS
3 Use classes to sort transactions
4 Setting up classes and subclasses=TASK_SETUPEDITCLASS
4 Assigning a class to a transaction=TASK_USECLASS
4 Changing a class=TASK_CHANGECLASS
4 Deleting a class=TASK_DELETECATCLASS
4 Looking at all transactions that use a class=TASK_REPORTCLASS
4 Printing a copy of the Class list=TASK_PRINT_REPORT
3 Work with reports of my data
4 Create a report
5 Creating an EasyAnswer report=INTRO_EZREPORT
5 Looking at sample reports=INTRO_SAMPLEREP
5 Creating a standard report=TASK_STANDREP
5 Creating QuickReports=TASK_REP_QUICK
5 Reporting on transactions used in a register=TASK_REGISTERREPORT
5 Changing the way reports work=TASK_OPREPORT
4 Modify a report
5 Changing the title, date range, or accounts to include=TASK_CHANGEDATAONREPORT
5 Adjusting report column widths=TASK_CHGREPORTCOL
5 Displaying more columns onscreen=QUICKTIPS_REPORT_COLUMNS
5 Viewing more detail in a report=TASK_REPORT_QUICKZOOM
5 Customizing a report=TASK_CUSTOMIZEAREPORT
5 Limiting the transactions included in a report=TASK_FILTER
5 Creating a report on selected categories=TASK_SELITEM
5 Creating a report on selected accounts=TASK_SELACCT
5 Reviewing your data at the end of the year=TASK_CLOSEOUT
4 Memorize a report for later use
5 Memorizing a report=TASK_MEMORREP
5 Recalling a memorized report=TASK_MEMREP
5 Renaming a memorized report=TASK_RENAMEMEMREP
5 Deleting a memorized report=TASK_DELETEMEMREP
4 Print a report
5 Preparing a printer to print reports=TASK_PRINTREPORT_SETUP
5 Printing a report=TASK_PRINT_REPORT
5 Changing the font for reports=TASK_SETUPPRINTER
5 Changing the way reports work=TASK_OPREPORT
4 Sending report data elsewhere
5 Copying Quicken report data to other programs=TASK_COPY_TO_CLIPBOARD_TABS
5 Transferring tax report data to a tax program=TASK_TAXEXPORT
5 Printing a report to a file=TASK_DISKREP
3 Work with graphs
4 Create a graph
5 Creating an EasyAnswer graph=INTRO_EZREPORT
5 Creating a customized graph=TASK_GRAPH_INCOME
4 Change a graph

5 Customizing a graph after you've created it=TASK_CUSTOMIZEAGRAPH
5 Seeing more detail in a graph=TASK_GRAPH_QUICKZOOM
5 Changing the way graphs work=TASK_GRAPH_PREF
4 Print a graph
5 Preparing a printer to print graphs=TASK_PRINTREPORT_SETUP
5 Printing a graph=TASK_GRAPH_PRINT
5 Speeding up graph printing on a PostScript printer=QUICKTIPS_GRAPH_POSTSCRIPT
5 Speeding up graph printing on a laser printer=QUICKTIPS_GRAPH_LASER
5 Changing the font for graphs=TASK_SETUPPRINTER
4 Memorize and recall a graph
5 Memorizing a graph=TASK_MEMORIZEGRAPH
5 Recalling a memorized graph=TASK_RECALLGRAPH
5 Renaming a memorized graph=TASK_RENAMEGRAPH
5 Deleting a memorized graph=TASK_DELETEGRAPH
3 View my finances at a glance
4 Using the My Finances page=HELP_HIGHLIGHTS_CENTER
4 Selecting what to view=TASK_SELECTSNAPSHOTTYPE
4 Creating a new view=TASK_CREATESNAPSHOTPAGE
2 Track loans and mortgages
3 Setting up a loan=REF_AMORT2
3 Refinancing a loan=TASK_LOAN_REFINANCE
3 Deleting a loan I've paid off or refinanced=TASK_LOAN_DELETELOAN
3 Make loan payments
4 Making a loan payment=TROUBLE_AMORT_MEMLIST
4 Making additional prepayments of principal=TASK_LOAN_PAYMORE
4 Deleting a mistaken loan payment=TASK_LOAN_DELMISTAKE
4 Changing the loan payment method=TASK_LOAN_CHANGEPAYMENT_METHOD
4 Changing the loan payee=TASK_LOAN_CHANGEPAYEE
3 Handle different kinds of loans
4 Handling loans with balloon payments=TASK_LOAN_BALLOON
4 Handling zero-interest loans=TASK_LOAN_ZEROINTEREST
4 Handling loans for which you receive payment=TASK_LOAN_RECEIVE
3 Change the terms of a loan
4 Deleting an interest rate=TASK_LOAN_DELINT
4 Changing the interest rate of an adjustable rate loan=TASK_CHANGEINTERESTRATE
4 Creating a report of the interest I've paid on my
loan=TASK_CALC_LOAN_INTEREST_PAID
2 Track my credit cards
3 Entering a credit card purchase=TASK_CREDITCARD_CHARGE
3 Entering a credit card payment without tracking details=TASK_CREDITCARDPAY
3 Entering a cash advance=TASK_CASH_ADVANCE
3 Changing the credit card limit=TROUBLE_ACCOUNT_CREDITCARD
3 Setting up a line of credit or equity account=TIPS_LINEOFCREDIT
3 Making Quicken agree with my credit card statement
4 Reconciling a credit card account=TASK_RECONCC
4 Adjusting the register to match a credit card statement=TASK_CCADJUST
2 Track my investments
3 Set up my investments
4 Setting up accounts=REF_WHICHTYPEOFACCOUNT
4 Setting up securities=TASK_SETUPEDITSEC
4 Setting up security types=TASK_SETUPEDITTYPE
4 Setting up investment goals=TASK_SETUPEDITGOAL
3 Enter investment transactions
4 Entering a basic investment transaction=TASK_ADDINVTRANS
4 Entering common investment transactions=IND_POPUP_HANDLINGTRANSACTIONS
4 Using a memorized investment transaction=TASK_USEMEMINVTRANS
4 Reconciling an investment account=TASK_RECONINV

4 Estimate capital gains from sales
5 Estimating capital gains=TASK_CGE_ESTIMATE_GAIN
5 Viewing net proceeds of sales=TASK_CGE_VIEW_NET
2 Research my investments
3 Research securities and mutual funds=NEWS_MORE_RESEARCH_TOOLS
3 Track security prices
4 Updating security prices=TASK_CHANGEPRICE
4 Updating security prices via the Internet=TASK_PRICEOL
4 Tracking securities and indexes I don't own=TASK_WATCHLIST
4 Viewing a security's price history/market value graph=HELP_GRAPH_PRICEHISTORY
3 Track securities online
4 Downloading historic prices=TASK_HISTORIC_DOWNLOAD
4 Downloading prices for indexes=add_indices_task
4 Getting news headlines for securities=NEWS_FIRST_DOWNLOAD
3 Analyze investment performance
4 Seeing how my investments are performing=TASK_INVPERFORM
4 Creating reports on my investments=GLOSS_REP_INVEST_DESC
4 Graphing my investments=TASK_GRAPH_INVEST
2 Budget and forecast for the future
3 Budget to reach goals
4 Set up budgets
5 Creating my first budget=TASK_BUDGET_CREATE
5 Moving quickly through a budget=HELP_BUDGET_NAVIGATE
5 Entering amounts based on past transactions=TASK_BUDGET_AUTOCREATE
5 Entering items that occur at two-week intervals=TASK_BUDGET_BIWEEKLY
5 Setting up budget amounts for account transfers=TASK_BUDGET_TRANSFER
5 Creating a budget from your forecast=TASK_FORECAST_TRACK
4 Manage and change budgets
5 Editing budget amounts=HELP_BUDGET_AMOUNTS
5 Using category groups in a budget=TASK_CATDESCRIP
5 Creating additional budgets=TASK_BUDGET_ADDIT
4 Create budget reports and graphs
5 Choosing a budget report to create=TASK_BUDGETREP
5 Graphing my budget performance=TASK_GRAPH_INCOME
4 Print and export a budget
5 Printing a budget=TASK_PRINT_REPORT
5 Copying a budget to a spreadsheet program=TASK_COPYBUDGETTOCLIP
3 See if I can make less or save more
4 Create forecasts
5 Creating a forecast graph=TASK_FORECAST_CREATE
5 Creating a forecast from my budget=QUICKTIPS_FORECAST_FROMBUD
5 Printing a forecast=TASK_PRINTFORECASTS
5 Looking at details behind forecast events=TASK_FORECAST_SHOW_ALL
4 Change a forecast
5 Changing the forecast time period=TASK_FORECAST_TIME
5 Selecting accounts for my forecast=TASK_FORECAST_SELECTACCTS
5 Creating a new forecast item=TASK_FORECAST_CREATEITEM
5 Changing my forecast amounts=TASK_FORECAST_CHANGE
5 Changing an Estimated Item to a Known Item=TASK_FORECAST_ETOK
5 Changing a Known Item to an Estimated Item=TASK_FORECAST_KTOE
5 Deleting a forecast item=TASK_FORECAST_DELETE
4 Compare different forecast scenarios
5 Creating multiple forecast scenarios=TASK_FORECAST_SCENARIOS
5 Saving a forecast projection line=TASK_FORECAST_SAVEPROJ
5 Retrieving a saved graph=TASK_FORECAST_RETRIEVE
5 Comparing two forecast scenarios=QUICKTIPS_FORECAST_COMPARE
5 Creating a budget from my forecast=TASK_FORECAST_TRACK

3 Play "what if" with Quicken financial calculators
4 See the formulas behind these calculations=INFO_CALC_FORMULAS
4 Loan calculator
5 Calculating loan amounts=TASK_CALC_LOAN
5 Calculating a six-month loan=TROUBLE_CALC_SIXMO
5 Calculating loan payments=TASK_CALC_LOAN_PAY
5 Prepaying a loan=TASK_CALC_PREPAY
4 Investment savings calculator
5 Calculating a starting amount for my savings=TASK_CALC_INVEST
5 Calculating my regular savings contribution=TASK_CALC_INVEST_CONTRIB
5 Calculating how much I can save=TASK_CALC_INVEST_BALANCE
4 College calculator
5 Calculating a starting amount=TASK_CALC_COLLEGE2
5 Calculating my annual college contribution=TASK_CALC_COLLEGE3
5 Calculating how much my savings will provide=TASK_CALC_COLLEGE1
4 Retirement calculator
5 Calculating a starting amount=TASK_CALC_RETIRE1
5 Calculating my annual retirement contribution=TASK_CALC_RETIRE2
5 Calculating how much retirement income I'll have=TASK_CALC_RETIRE3
4 Loan calculator
5 Calculating the break-even point for a new loan=TASK_CALC_REFINANCE_STEPS
3 Set aside money for a specific purpose
4 Set up a savings goal
5 Setting up a savings goal=TASK_SETUPGOAL
5 Contributing to a savings goal=TASK_TRANSFERTOSAVINGSGOAL
4 Manage a savings goal
5 Withdrawing from a savings goal=TASK_WITHDRAWFROMSAVINGSGOAL
5 Editing a savings goal=HELP_EDIT_SAVINGSGOAL
5 Deleting a savings goal=TASK_DELETEGOAL
5 Reporting on a savings goal=TASK_REPORTGOAL
5 Tracking progress toward a goal=TASK_DISPLAYTOOLBAR
5 Display different goals on the progress bar=TASK_DIFF_GOAL
5 Seeing my actual bank balance=TROUBLE_BANKBAL
3 Manage my credit and debt
4 Find out about credit reports
5 Requesting a credit report from Consumer Info.com=credit_check_request_task
4 Reduce my debt
5 Starting the Debt Reduction planner=debt_reduction_start_task@dbtred.hlp>nav
5 Creating a new debt reduction plan=create_new_debt_plan_task@dbtred.hlp>nav
5 Learning more ways to reduce debt=help_debtreduct_moreinfo@dbtred.hlp>nav
2 Track emergency information
3 Introducing the Emergency Records
Organizer=HELP_ERO_TAB_INTRODUCTION@ero.hlp>nav
3 Getting started=HELP_ERO_Getting_started@ero.hlp>nav
3 Seeing what's in the Emergency Records
Organizer=ERO_Table_of_contents@ero.hlp>nav
3 Creating a new record=HELP_ERO_TAB_ADDRECORDS@ero.hlp>nav
3 Viewing an existing record=ERO_Viewing_an_existing_record@ero.hlp>nav
3 Printing an area, topic, or record=HELP_ERO_PRINT@ero.hlp>nav
3 Keeping your emergency records
secure=ERO_Keeping_your_data_secure@ero.hlp>nav
3 Creating reports=HELP_ERO_TAB_REPORT@ero.hlp>nav
3 Printing reports=ERO_Printing_reports@ero.hlp>nav
2 Track my belongings
3 Get started
4 Starting Quicken Home Inventory=start_exit_ID@qhi.hlp>nav
4 Exiting Quicken Home Inventory=task_exit_QHI@qhi.hlp>nav

4 Getting Help=help_button_ID@qhi.hlp>nav
3 Set up Quicken Home Inventory
4 Changing the date style=date_style_pref_id@qhi.hlp>nav
4 Viewing my inventory by location or category=view_by_lc_id@qhi.hlp>nav
3 Enter items and view my inventory
4 Update items
5 Entering new items from scratch=adding_new_items_ir_id@qhi.hlp>nav
5 Copying items=copying_existing_items_IR_ID@qhi.hlp>nav
5 Editing items =modifying_existing_items_IR_ID@qhi.hlp>nav
5 Deleting items=task_delete_item_id@qhi.hlp>nav
5 Adding a resale value to an item=task_add_s_value_history_id@qhi.hlp>nav
5 Editing resale value for an
item=task_edit_resale_value_history_id@qhi.hlp>nav
5 Deleting resale value for an
item=task_delete_resale_value_history_id@qhi.hlp>nav
4 Update locations
5 Adding locations=task_create_location@qhi.hlp>nav
5 Editing locations=task_edit_location@qhi.hlp>nav
5 Deleting locations=task_delete_location@qhi.hlp>nav
4 Update categories
5 Adding categories=task_create_category@qhi.hlp>nav
5 Editing categories=task_edit_category@qhi.hlp>nav
5 Deleting categories=task_delete_category@qhi.hlp>nav
4 Finding items=task_find_item@qhi.hlp>nav
4 Moving items from one location to another=task_move_location@qhi.hlp>nav
4 Creating inventory reports=task_create_report@qhi.hlp>nav
3 Handle insurance policies and claims
4 Update insurance policy information
5 Adding policies=task_add_new_policy@qhi.hlp>nav
5 Editing policies=task_edit_policy@qhi.hlp>nav
5 Deleting policies=task_delete_policy@qhi.hlp>nav
5 Moving items from one policy to another=task_move_policy@qhi.hlp>nav
5 Creating insurance reports=task_create_report@qhi.hlp>nav
4 Create a claim
5 Entering information about insurance claims=task_set_up_claim@qhi.hlp>nav
5 Making adjustments to insurance claims=task_edit_claim@qhi.hlp>nav
5 Closing insurance claims=task_close_claim@qhi.hlp>nav
3 Customize and print reports
4 Selecting items for detail
reports=select_items_for_custom_claim_report_id@qhi.hlp>nav
4 Changing report fonts=task_change_fonts@qhi.hlp>nav
4 Printing reports=printing_reports_id@qhi.hlp>nav
4 Changing printer options=task_change_print_options@qhi.hlp>nav
3 Work with Quicken
4 Sending inventory resale values from QHI to
Quicken=update_Quicken_button_id@qhi.hlp>nav
4 Sending data to another Quicken asset
account=task_send_new_account@qhi.hlp>nav
4 Viewing QHI information in Quicken=view_qhi_in_Q_id@qhi.hlp>nav
4 Viewing my QHI assets in net worth reports and
graphs=task_view_asset_account_in_Q_graph@qhi.hlp>nav
3 Manage my Quicken Home Inventory file
4 Creating a new Quicken Home Inventory file=task_file_new@qhi.hlp>nav
4 Opening an existing Quicken Home Inventory file=task_open_file@qhi.hlp>nav
4 Protecting a file with a password=setup_new_password_id@qhi.hlp>nav
4 Changing or deleting my password=change_existing_password_id@qhi.hlp>nav
4 Backing up my Quicken Home Inventory file=task_filebackup@qhi.hlp>nav

4 Restoring my Quicken Home Inventory file=task_restore_file@qhi.hlp>nav
2 Get ready for tax time
3 Taxes and Quicken categories
4 Tracking tax-related expenses=TASK_TAXCATEGORIES
4 Assigning tax form line items to categories=task_assign_line_items
4 Changing tax form line item assignments=task_remove_assignment
4 Creating a tax summary report=MENU_REP_HOME_TAX
3 Exporting your tax information
4 Creating a tax schedule report=MENU_REP_HOME_TAXSCD
4 Estimating capital gains=TASK_CGE_ESTIMATE_GAIN
4 Creating a capital gains report=MENU_REP_INVEST_CG
4 Transferring tax report data to a tax program=TASK_TAXEXPORT
3 Estimate my taxes with Tax Planner
4 Prepare to use Tax Planner
5 Seeing the interest I've paid this year on my
loan=TASK_CALC_LOAN_INTEREST_PAID
5 Handling multiple copies of the same tax forms=TASK_SETUPEDITCLASS
5 Assembling my tax information=Assembling_Your_Tax_Information_ID
4 Compute my estimated taxes
5 Setting my filing status and tax year=TRDB_SFS_ID
5 Getting tax information from the current file=Importing_Tax_Information_ID
5 Checking and adding to imported data=Checking_Data_ID
5 Creating multiple tax scenarios=Using_Tax_Scenarios_ID
5 Acting on my tax estimate=Estimating_Taxes_ID
5 Increasing or decreasing withholdings=Increase_Decrease_Withholdings_ID
5 Filing quarterly estimated tax
payments=Determining_Filing_Quarterly_Payments_ID
3 Find tax deductions
4 Finding Tax Deductions=starting_dedfinder_task@dedfindr.hlp>nav
2 Use Quicken's Internet Features
3 Internet Connection Setup=HELP_HOWTO_INETCONNECTION
3 Installing a Quicken-compatible Web browser=QUICKEN_COMPATIBLE_BROWSER
3 Troubleshooting Quicken Internet features=QUICKEN_IC_JUMP
2 Manage and archive my Quicken files
3 Back up and restore Quicken files
4 Backing up a Quicken file=TASK_BACKUP
4 Restoring a Quicken file=TASK_RESTOREFILE
4 Changing the frequency of automatic backups or turning them
off=TASK_CHANGEAUTOBACKUPS
4 Changing the number of backup copies Quicken keeps=TASK_CHANGEAUTOCOPIES
3 Work with Quicken files
4 Saving your data=TASK_DATASAVE
4 Creating a Quicken file=TASK_CREATEFILE
4 Opening a Quicken file=TASK_OPENFILE
4 Copying a Quicken file=TASK_COPYFILE
4 Renaming a Quicken file=TASK_CHANGEFILENAME
4 Deleting a Quicken file=TASK_DELETEFILE
4 Checking the integrity of a Quicken file=TASK_VALIDATE
4 Moving Quicken files between computers=TASK_MOVINGDATA
3 Put the right categories into a file
4 Transferring categories to a new file=QUICKTIPS_CATEGORY_TRANSFER
4 Adding groups of categories to a file=TASK_MANAGECAT
3 Convert data between versions of Quicken
4 From a previous Windows version of Quicken=HFIELD_ABOUTCONVERT
4 From a DOS version of Quicken=TASK_DOSPORT
4 From Quicken 6 for Macintosh (or earlier versions)=TASK_MACPORT
4 From Quicken 7 for Macintosh=TASK_MACPORT7

4 To Quicken 7 for Macintosh=TASK_WINTOMAC7
3 Transfer data to and from Quicken
4 Copying data from one account or file to another=TASK_EXPORT
4 Importing data from a QIF file=TASK_IMPORTQIF
4 Converting data from Microsoft Money files=TASK_CONVERTMONEY
4 Import security prices from an ASCII file=TASK_IMPORTPRICE
4 Copying a Quicken report to other programs=TASK_COPY_TO_CLIPBOARD_TABS
4 Transferring tax schedule report data to a tax program=TASK_TAXEXPORT
4 Copying a budget to a spreadsheet program=TASK_COPYBUDGETTOCLIP
3 Close out my accounts at year end
4 Archiving a Quicken file=TASK_ARCHIVE
4 Creating a new year file=TASK_NEWYEAR
4 Reviewing your data at the end of the year=TASK_CLOSEOUT
3 Use passwords to keep my data secure
4 Providing a file password=TASK_PWD
4 Providing a transaction password=TASK_PWD_TRANS
4 Changing or removing a file password=TASK_CHANGEPWD
4 Changing or removing a transaction password=TASK_CHANGEPWD_TRANS
2 Set Quicken options
3 Change settings that affect all of Quicken
4 Changing the way Quicken works=TASK_PREFSGENERAL
4 Changing QuickTabs=TASK_HOMEBASE
4 Turning off QuickTabs=TASK_ONOFFQUICKTABS
4 Controlling which windows open when I start Quicken=TASK_DESKTOP_SAVE
4 Turning off or changing Quicken's sound effects=TASK_TURNOFF_SOUND
4 Changing Quicken's color scheme=TASK_COLOR_SCHEME
3 Change options that affect particular Quicken windows
4 Turning off the beep in the register=TASK_TURNOFF_BEEP
4 Switching back to Quicken 5's beep sound=TASK_QUICKEN5_SOUNDS
4 Changing the way Quicken writes checks=TASK_OPCHECK
4 Changing the way the register works=TASK_OPTTRANS
4 Changing how QuickFill works=TASK_PREF_QUICKFILL
4 Changing the way reports work=TASK_OPREPORT
4 Changing the way Reminders and Billminder work=TASK_BILLMINDER
4 Changing the way graphs work=TASK_GRAPH_PREF
3 Use the action button
4 Turning the action button on or off=TASK_ONOFFQUICKTABS
4 Customizing the action list=TASK_ICON_ADD
4 Changing the order of action items=TASK_ICON_CHANGEORDER
4 Deleting an item from the action list=TASK_ICON_DELETE
4 Assigning a speed key to an action=TASK_ICON_SHORTCUTS
3 Change colors and fonts
4 Changing Quicken's color scheme=TASK_COLOR_SCHEME
4 Changing the colors used in registers=TASK_PREF_COLORS
4 Changing the font and font size used in registers=TASK_PREF_REGFONT
1 Troubleshooting
2 Files and accounts
3 What is the difference between a file and an account?=TS_ACCOUNT_FILE_DIFFERENCE
3 Quicken files
4 In what cases should I create a new Quicken file?=TS_FILE_WHEN_TO_ADD
4 Can I move Quicken data from my old computer to a new one?=TASK_MOVINGDATA
4 Can I switch from my business file to my personal file?=TASK_OPENFILE
4 I can't find my file=C_CANT_FIND_FILE
4 I can't restore a file=C_CANT_RESTORE_FILE
4 I deleted a file: can I get it back?=C_DELETED_MY_FILE
4 I forgot my file password=C_FORGOT_PSWRD

4 Quicken asks for a password, but I never set one up=C Asking_For_Pswd
4 Quicken is not accepting my file password=C Not_Accepting_Pswd
4 Does Quicken require that I do a year-end closeout?=TS_File_Must_I_Closeout
4 What's the difference between a year-end closeout and Copy
File?=TS_File_Copy_Vs_Yearend
3 Accounts
4 I can't find my account=TS_Cannot_Find_Account
4 I've set up an account in the wrong file=C_Acct_Setup_In_Wrong_File
4 My investment and checking accounts are linked: can I delete just one of
them?=TS_Invest_Delete_Linked_Accounts
4 My liability account increases when I transfer a
payment=C_Liab_Acct_Increases
4 Message, "Name already in use"?=C_Acct_Name_In_Use
4 I entered some transactions in the wrong account=C_Regis_Copy_Trans
2 Registers
3 Missing transactions or unexpected results
4 I get split information that I don't want=C_Reg_Unwanted_Split
4 I entered a transaction, and it disappeared=C_Txn_Disappeared
4 I'm missing transactions in my register=C_Txns_Missing_In_Regstr
4 When I import, I get duplicate transactions=C_Dupes_After_Import
4 My transactions are in a different order now=TS_Reg_Transaction_Order
3 Entering transactions
4 Can I change the opening balance?=TS_Reg_Change_Balance
4 Can I void a check in my register?=TS_Reg_Void_Transactions
4 How can I enter a printable check in the register
window?=TS_Reg_Enter_A_Check
4 How do I categorize a transfer?=TS_Reg_Transfer_Cat
4 How do I delete a transaction?=Task_Deletetrans
4 Can I enter payments to reduce my credit card balance?=TS_Reg_Pay_Credit_Card
4 I have a negative number in my split transaction=TS_Reg_Negative_Split
4 Can I transfer money from checking to savings?=Task_Transfer
4 I entered some transactions in the wrong account=C_Regis_Copy_Trans
3 What's what in the Register
4 I have brackets around a category name=TS_Reg_Brackets
4 What's the difference between c and R in the Clr field?=Trouble_XandXsymbols
4 Why is there a blue line on my register?=TS_Reg_Blue_Line
4 I have both a current and an ending balance=Gloss_Bal
3 Changing the register
4 Can I sort my register by check # instead of by date?=Task_Regisort
4 Can I remove names from the drop-down payee list?=Task_Deletememtrans
4 I can see only one line of information per transaction=Task_Oneline
4 Can I make the register type easier to read?=Task_Pref_Regfont
4 Can I change the name at the top of my register?=TS_Reg_Editacct_Name
3 Common questions
4 How do I print a register showing running
balances?=TS_Print_Register_Running_Balance
4 Can Quicken convert US dollars to foreign currency?=Howdoi_Currency
2 Invoices/receivables
3 How do I adjust the form to fit Intuit's double-window
envelope?=C_Print_Double_Window_Envelopes
3 What can I do to decrease the time it takes to print an
invoice?=C_Print_Shorten_Invoice_Print_Time
3 What should I do if some of the lines on my invoice are not
printing?=C_Print_Invoice_Lines
3 What should I do if some of the invoice headings are not
printing?=C_Print_Invoice_Headings_Not_Printing
2 Printing

3 General printing problems
4 I get illegible characters=C_RPT_PRINTS_GARBAGE
4 I have a color printer, but I can't print in color=C_RPT_NO_COLOR_PRINT
4 My Quicken screen won't print in color=TS_REPORT_SCREEN_IN_COLOR
3 Checks
4 Checks mailed in window envelopes are getting returned=C_PRINT_CHECK_RETURNED
4 I can't align my checks=C_CK_NOT_ALIGN
4 How do I change the font on my checks?=TS_PRINT_CHECK_FONT_CHANGE
4 Message, "No checks to print"=FAQ_PRINT_MSGE_NO_CKS_TO_PRNT
4 My printer skips and feeds blank checks=C_CK_FORM_FEED
4 The address isn't printing=C_CKS_NO_ADDRESS
4 The date or logo gets cut off=C_CK_DATE_CUT_OFF
4 The information printing on checks is wrapping
around=TS_PRINT_CHECK_WRAPS_AROUND
4 On voucher checks, the voucher section isn't printing=TS_PRINT_CHECKS_VOUCHER
4 When I try to print checks, nothing prints=C_CK_NO_PRINT
3 Reports and lists
4 Budget report amounts are missing decimal places=C_XX_XXX_XX_AS_X
4 How do I print my category list?=TASK_DISKREP
4 My report does not print as it appears on my
screen=TS_REPORT_APPEARS_DIFFERENT
4 Text is clipped near the edges on reports and lists=C_RPT_COLUMN_CUT
4 The information at the bottom is cut off=TS_REPORT_PRINT_CUT_OFF
4 When I try to print a report nothing prints=C_RPT_NO_PRINT
3 Registers and budgets
4 How do I print a register showing running
balances?=TS_PRINT_REGISTER_RUNNING_BALANCE
4 Can I print specific budgets when I have more than
one?=TS_PRINT_SPECIFIC_BUDGET
2 Balancing your account
3 I can't reconcile my statement=C_IS_THIS_FIRST_TIME_RECON
3 Understanding reconciliation=C_UNDERSTANDING_RECONCILE
3 What's the difference between c and R in the Clr field?=TROUBLE_XANDXSYMBOLS
3 What report can I run to help me balance my
account?=TS_REPORT_HELP_ME_BALANCE
3 After reconciling, Quicken wants to adjust my opening balance=TASK_OPENADJUST
3 Should I reconcile my account if I download
statements?=TS_ONBANK_MUST_I_RECONCILE
2 Online financial services
3 Downloading data
4 How current is my downloaded information?=FAQ_HOW_CURRENT_IS_DOWNLOADED_DATA
4 My download stopped and now I can't get my
statement=C_IC_DL_STOP_CANT_GET_STMT
4 What if there's a mistake in downloaded data?=FAQ_ERROR_IN_STATEMENT
4 Should I reconcile my account if I download
statements?=TS_ONBANK_MUST_I_RECONCILE
4 Online financial services error messages=QUES_ONLERRORS
3 Online payments
4 Can I use online financial services with a business
account?=FAQ_ONBANK_USE_WITH_BUSACCT
4 Can I use online financial services with jointly held
accounts?=FAQ_ONBANK_USE_WITH_JOINT
4 How are my online payments made?=FAQ_HOW_ARE_PMTS_MADE
4 How do I find out if an online payment has been made?=TASK_PMT_INQUIRY
4 How do I switch from CheckFree to online
payment?=task_SWITCH_FROM_CF_TO_ONPAY

4 How do I switch from online payment to
CheckFree?=TASK_SWITCH_FROM_ONPAY_TO_CF

4 How often can I download information?=FAQ_HOW_OFTEN_DOWNLOAD_OR_UPDATE_PMT

4 My online payments are often late=C_LATE_PAYMENTS

4 What is a repeating online payment?=FAQ_WHAT_IS_REPEAT_PMT

4 When will the payee receive my payment?=FAQ_ONPAY_LEAD_TIME

4 How do I inquire about an online payment?=TASK_PMT_INQUIRY_CHOICES

4 Who can I pay with online payments?=FAQ_WHO_CAN_I_PAY

3 General Questions

4 Is my online information secure?=FAQ_SECURITY

4 Can I transfer money between financial
institutions?=FAQ_TRANSFER_BETWEEN_BANKS

4 I can't find the standard merchants list=C_STANDARD_MERCHANTS

4 I get a message that my account isn't
recognized=C_IC_PROCESS_CTR_NOT_RECOGNIZE

4 Message, "Cannot connect. Please try later"=C_CONNECT_PLS_TRY_LATER

2 Quicken error messages

3 Cannot connect. Please try later=C_CONNECT_PLS_TRY_LATER

3 Memorized transaction list is full=C_ERR_MEM_TXN_LIST_FULL

3 Name already in use=C_ACCT_NAME_IN_USE

3 No checks to print=FAQ_PRINT_MSGE_NO_CKS_TO_PRNT

3 Not enough memory=C_ERR_NOT_ENOUGH_MEM

3 Online services (various)=QUES_ONLERRORS

3 Out of local memory=C_ERR_OUT_OF_LOCAL_MEM

3 Unable to read/write to drive A: (or B:)=C_ERR_CANT_READ_WRITE_DRIVE_A

3 Unable to update account headers=C_ERR_CANT_UPDATE_ACCT_HEAD

2 Multimedia (Audio/Video)

3 About multimedia troubleshooting=HELP_MMEDIA_TROUBLE

2 Loans

3 How do I set up an existing loan?=TS_LOAN_EXISTING

3 How can I tell if I can afford a specific loan?=TASK_CALC_LOAN

3 How do I track property tax and other items in my loan
payment?=TS_LOAN_PROPTAX_ETC

3 How do I change my loan balance if its wrong?=C_ORIG_VS_CURRENT_LOAN_BAL

3 How much interest have I paid so far this year?=TASK_CALC_LOAN_INTEREST_PAID

3 Deleted a loan and can't set one up with same
name=C_CANT_RESET_LOAN_SAME_NAME

3 Deleted a loan transaction and now schedule is
wrong=C_DEL_TXN_NOW_SCHED_WRONG

3 Quicken's loan schedule does not match my bank's
amortization=TS_LOAN_DIFFERENT_FROM_BANK

3 The amortization is incorrect on last month's
payment=C_AMORT_WRONG_ON_LAST_PMT

3 The split information is missing from my memorized
payment=C_SPLIT_GONE_MEM_TXN_LOAN

3 What is a balloon payment?=HOTSPOT_BALLOONINFOSUMM

3 What is Quicken's amortization formula?=FORM_AMORT

2 Reports and graphs

3 Unexpected or incorrect data in reports

4 An income category is showing a negative amount=TS_REPORT_INCOME_CAT_NEGATIVE

4 Entered a budget amount and report amount is
different=TS_REPORT_BUDGET_DIFFERENT_AMOUNT

4 Only one account included in reports=TASK_CHANGEDATAONREPORT

4 Too many accounts included in reports=TASK_CHANGEDATAONREPORT

4 I see categories I have not budgeted
for=TS_REPORT_BUDGET_UNWANTED_ZERO_AMOUNTS

4 Fiscal year different than 12 mo. period in reports=TS_REPORT_FISCAL_YEAR_CHANGE

4 My net worth report doesn't look complete=C_NET_WORTH_HAS_NOT_ALL_INFO

4 My report does not show a balance forward=TS_REPORT_NO_BALANCE_FORWARD

4 My report shows a category called Other=TS_REPORT_CAT_CALLED_OTHER

4 The numbers look wrong on my report=C_RPT_WRONG_HOW_TO_CHECK

3 Report printing problems

4 The printing in my report overlaps=C_PRINT_OVERLAP_OR_BAD_PREVIEW

4 My report won't fit on a single page=C_PRINT_OVERLAP_OR_BAD_PREVIEW

4 When I print reports I get illegible characters=C_RPT_PRINTS_GARBAGE

4 I have a color printer, but I can't print in color=C_RPT_NO_COLOR_PRINT

4 My report does not print as it appears on my screen=TS_REPORT_APPEARS_DIFFERENT

4 Text is clipped near the edges on reports and lists=C_RPT_COLUMN_CUT

4 Information at the bottom is cut off=TS_REPORT_PRINT_CUT_OFF

4 When I try to print a report nothing prints=C_RPT_NO_PRINT

3 Creating and customizing reports

4 Can I change column headings in reports?=TS_REPORT_CHANGE_COLUMN_NAME

4 Can I rearrange the columns in my reports?=TS_REPORT_COLUMN_REARRANGE

4 Can I send my report data to another software program?=TS_REPORT_TO_OTHER_PROGRAM

4 Can I change the title of an existing report?=TS_REPORT_CHANGE_TITLE

4 How can I include category groups in my report?=TS_REPORT_INCLUDE_SUPERCATEGORIES

4 How can I retrieve a report that I've memorized?=TASK_MEMREP

4 Can I save my report customization?=TASK_MEMORREP

4 Columns in reports either too wide or too narrow=TASK_CHGREPORTCOL

4 The numbers look wrong on my graph=C_GRAPH_WRONG

4 Can't select category groups option on the Include tab=TS_REPORT_INCLUDE_SUPERCATEGORIES

4 While customizing my report I lost a column=TS_REPORT_RESET_COLUMNS

2 Categories

3 Common questions

4 Income category showing a negative amount in my report=TS_REPORT_INCOME_CAT_NEGATIVE

4 Can I change an income category to an expense category?=TS_CAT_CHANGE_TYPE

4 Do I need to use categories when entering transactions?=TS_CAT_REQUIRED

4 How can I add Quicken's business categories to a file?=TASK_MANAGECAT

4 How do I merge a subcategory with its parent category?=TASK_MERGECATS

4 Can I merge transactions with different categories?=TASK_MERGECATS

4 Can I change the category name on several transactions?=FAQ_CHANGECAT

3 The Category list

4 How are the categories sorted in the Category list?=TS_CAT_HOW_SORTED

4 How do I print my category list?=TASK_PRINT_REPORT

4 I don't have any categories on my Category list=C_NO_CATS_IN_NEW_FILE

4 I have duplicate categories on my Category list=C_CATS_DUPE_CATS_IN_QIF

4 Will deleting a category delete associated transactions?=TS_CAT_BLOW_CATS

2 Billminder and Reminders

3 Why do I get Reminders if Billminder is turned off?=C_GET_REMIND_WHEN_BILLMNDW_IS_OFF

3 Why does Billminder tell me I have transactions due, when I don't?=C_BILLMIND_IN_OLD_FILE

3 Why isn't Reminders or Billminder telling me about transactions due?=C_BILLMIND_DOES_NOT_WORK

2 Investments

3 Investment accounts and registers

4 Can I change single mutual fund accts. to portfolio
accts?=TS_INVEST_CHANGE_SMF_TO_PORT

4 Can I move or add shares without executing a Buy?=TS_INVEST_MOVE_SHARES_IN

4 How can I reconcile my investment account?=TASK_RECONINV

4 Can I remove shares without executing a Sell?=TS_INVEST_MOVE_SHARES_OUT

4 I don't know what kind of investment account to use=REF_REGVSSINGACCOUNT

4 Broker holds part of the cash for 30 days when I sell=TROUBLE_INVEST_BROKER

4 My ending cash balance is negative: how can I fix it?=INVTB_CASHBAL

4 Investment and checking account linked: can I delete just
one?=TS_INVEST_DELETE_LINKED_ACCOUNTS

4 Market value in register doesn't match Portfolio
View=C_INV_MKT_VAL_PV_NO_MATCH_RGSTR

4 Numbers in register aren't calculating correctly=INVTB_NUMCALC

4 I can't select a Buy action in my investment
account=TS_INVEST_ADD_SECURITY_TO_SMF

3 Securities and prices

4 I want a list of all activity for a particular
stock=TS_INVEST_ALL_SECURITY_TRANSACTIONS

4 How can I update my stock prices?=TASK_CHANGEPRICE

4 Message "This security is in use"=TS_INVEST_SECURITY_IN_USE

4 I can't add another security to my investment
account=TS_INVEST_ADD_SECURITY_TO_SMF

4 Can I remove a security from my Watch list?=TS_INVEST_REMOVE_FROM_WATCH_LIST

4 If I delete a security, will all prices still be
stored?=TS_INVEST_DELETE_SECURITY_WHAT_HAPPENS

4 Price history is missing for a security=C_INV_PRICE_HIST_MISSING

3 Portfolio View

4 Sold all shares in old version but shares still appear=TS_INVEST_GHOST_SHARES

4 Can I rearrange or customize info. in Portfolio
View?=TASK_INVEST_CUSTOMIZEPORT

4 Securities not showing in Portfolio View=TS_INVEST_SECURITY_MISSING_PORTVIEW

4 Market value in register doesn't match Portfolio
View=C_INV_MKT_VAL_PV_NO_MATCH_RGSTR

4 Why is there an "e" next to price in Portfolio View?=TS_INVEST_E_IN_PORTVIEW

3 Investment reports and graphs

4 Investment report shows stocks I don't want to see=TS_REPORT_SELECT_SECURITY

4 Report does not show same Market Value as
register=TS_REPORT_PORTFOLIO_MARKET_VALUE_WRONG

4 My report does not show a cost basis for my security=TS_REPORT_NO_COST_BASIS

4 The capital gains report is missing transaction=C_INV_GAINS_RPT_TXNS_MISSING

4 The capital gains report shows incorrect numbers=C_INV_GAINS_RPT_IS_WRONG

4 The investment graph is missing securities=C_SECY_MISSING_FROM_GRAPH

4 Investment performance report shows too high a
return=C_INV_PERFORMANCE_RPT_WRONG

4 IRR in the report doesn't match the IRR in the
graph=C_IRR_RPT_AND_GRAPH_DONT_MATCH

2 Budgets

3 AutoCreate doesn't work=C_AUTO_CREATE_NO_WORK

3 Budget report amounts are missing decimal places=C_XX_XXX_XX_AS_X

3 Budgeted and actual amounts don't match using
AutoCreate=C_BUDGET_ACTUAL_DIFFER_AUTOCREATE

3 Can I print a specific budget when I have more than
one?=TS_PRINT_SPECIFIC_BUDGET

3 Report shows different amount than budget amount
entered=TS_REPORT_BUDGET_DIFFERENT_AMOUNT

3 My budget report is wrong=C_PRO_RATED

3 The Budget window shows an account I've
deleted=C_BUDGET_HAS_ACCT_THATS_DELETED
3 Budget report shows categories not budgeted
for=TS_REPORT_BUDGET_UNWANTED_ZERO_AMOUNTS
2 Taxes
3 Business income and expense numbers are
wrong=C_TAX_TAXPLANNER_BUSINESS_INC_EXP_WRONG
3 Information missing from the import to my tax
program=C_TAX_CATS_NO_IMPORT_TO_TAX_PRGRM
3 Information is missing from Tax schedule
report=C_TAX_TAX_SCHD_RPT_MISSING_INFO
3 Tax withheld is too high=C_TAX_TAXPLANNER_WITHHOLD_TAX_TOO_HIGH