



User's Guide

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Welcome to Quicken® Personal Finance Software

This User's Guide is designed to guide you through setting up and learning to use Quicken for Windows so you can quickly become a confident Quicken user. The lessons are designed to teach you the basics—setting up Quicken, tracking your income and expenses, paying your bills, and reconciling your bank accounts.

START HERE: Choose



MANUAL

or



ONLINE

The first step is to decide how you want to enter your financial information or transactions into Quicken. We can help you decide which method is best for you, and how to find out if the financial institution(s) you use offer online data retrieval.

[Start Here](#)

Lesson 1: Setup

Choose: [Manual](#) or [Online](#)

Once you've decided to use the manual or online method of data entry (see [Start Here](#) above), you're ready to set up Quicken. We'll walk you through adding two accounts, a checking account and your most active credit card. Once you've set up your accounts you can choose to go through any of the other lessons at your convenience.

Lesson 2: Track Your Income and Expenses

Choose: [Manual](#) or [Online](#)

After you've set up your first accounts (see Lesson 1, above), we'll show you how you can use Quicken to see where your money is going. You'll learn about categories, transactions, and reports.

Lesson 3: Pay Your Bills

Choose: [Manual](#) or [Online](#)

To learn how to pay bills from within Quicken, choose **Online**. You'll need to sign up for the Quicken Bill Pay service, or the online payment service provided by your bank. Or, to learn how to keep track of handwritten checks, print checks using Quicken, or track bills paid through your bank's web site, select **Manual**. Some customers use a combination of online and manual to pay their bills; in that case, you'll want to start with the online lesson.

Lesson 4: Reconcile Your Accounts

Choose: [Manual](#) or [Online](#)

We'll show you how to check for any discrepancies between your bank's records and your Quicken transactions—whether you're entering data manually (choose **Manual**), or automatically (choose **Online**.)

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