

# **Customizing Quicken 2006 for Personal Use**

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# Finding Information

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

SCSCC Seminar PDF: <http://www.scsc.com/smr>

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 CTRL-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**