Help Contents for Quicken Quotes

✔ **To learn how to use Help, choose How to Use Help from the Help menu on this window.**
✔ **To learn how to use Quicken Quotes, click on a topic below.**

Quick Start

Tells you how to retrive stock quotations in five quick steps.

About Quicken Quotes

Gives you a brief introduction to Quicken Quotes.

QUICKEN QUOTES HOTLINE

Tells you about the Quicken Quotes 900 number Hotline.

COMPUSERVE ACCOUNT

Tells you about using your CompuServe account with Quicken Quotes.

Using Quicken Quotes

Provides task-oriented instructions that show you how to perform Quicken Quotes activities.

Reference and Tips

Quick reference to Quicken Quotes buttons, commands, dialog boxes, and shortcuts.

First Aid for Common Problems

Troubleshooting guidelines and help for common communications problems.

NOTE

To find specific information about features, functions, and tasks, use the **Help Keyword Search** by clicking the **Search** button on the **Help Window** button bar.

Using Quicken Quotes

✔ **Click on the following topics to see help for the main activities you perform in Quicken Quotes.**

Setting up Quicken

Tells you how to set up Quicken 3 for Windows to send ticker symbols and receive updated stock prices.

Setting up Quicken Quotes

Tells you how to set up your modem and login options for use with the Quicken Quotes Hotline, or with your CompuServe basic services account.

Using Ticker Symbols

Describes ticker symbols, tells you how to get symbols from Quicken, how to create and manage symbol sets, how to add and delete individual symbols, and how to use the Lookup Symbol button to look up symbols online.

Retrieving Quotations

Tells you how to use the Retrieve Stock Prices button to retrieve prices from the online stock quotation service.   Also gives you definitions for the retrieved information in the Stock Symbols display panel.

Sending Prices to Quicken

Tells you how to use the Send Price To Quicken button to update your Quicken stock prices.

Viewing Updated Stock Prices

Tells you how to use the Quicken Portfolio View and Price History dialog boxes to view and print stock prices from Quicken 3 for Windows.

☞ **NOTE**

For detailed help about a specific button, menu, command, feature or function, use the Help **Index** or **Search** button.

SEE ALSO

Reference and Tips

Reference and Tips

✔ **Click on the following topics for specific help about Quicken Quotes buttons, commands, and stock information.**

 IT'S IN THE BOOK

See the **Getting Started** section of your **Quicken Companion User's Guide** for information about installing Quicken Companion applications.

Starting and Exiting Quicken Quotes

Starting Quicken Quotes
Exiting Quicken Quotes
Shortcuts

Using the Quicken Quotes Main Window

The Quicken Quotes main window contains the following buttons and stock information:

Buttons in the button bar

Lookup Symbol button
Retrieve Stock Prices button
Send Prices to Quicken button
Exit button
Help button
Calculator button
About Quicken Quotes button

Stock symbol buttons

Set list box
New button
Delete button
Get Symbols From Quicken button
Manage Symbol Sets button
Modem Settings button
  Quicken Quotes Hotline 900 Phone Number
  CompuServe basic services account
  CompuServe Account Login and ID
Go To Quicken button

Stock Symbols display panel information

About Retrieved Stock Symbol Information

 SEE ALSO

Quick Start

[About Quicken Quotes](#)
[Using Quicken Quotes](#)

About Quicken Quotes

Welcome to the Quicken Quotes online stock price quotation program and service.   Here's why you use Quicken Quotes:

◆ Use it to retrieve stock, mutual fund, option, and index prices.

◆ As a Quicken user, you can send prices to Quicken 3 for Windows to update your **Investment Account**.   Also, you can send your **Security** list of stock symbols from Quicken to Quicken Quotes.

◆ You can start Quicken Quotes from Quicken 3 for Windows or from the Windows desktop. All you need is your computer, a modem, a telephone line, and Quicken Quotes running in Windows 3.1.

◆ You can retrieve online stock prices using either the **Quicken Quotes Hotline** or a **CompuServe basic services account** (if you are a CompuServe user).

☎ QUICKEN QUOTES HOTLINE

Using the Quicken Quotes Hotline 900 phone number

Setting up Quicken

Using your CompuServe account

Setting up Quicken

Quicken Quotes is an independent application that runs on Microsoft Windows. Like other Quicken Companion products it can be installed independently of Quicken and can be started from Windows or from Quicken.
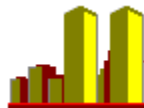
SEE ALSO

> **Quick Start**
> **Reference and Tips**
> **Using Quicken Quotes**

QUICKEN QUOTES HOTLINE ☎
Your direct line to Wall Street

Hotline 900 phone number

The Quicken Quotes Hotline is a **900** phone number. When you use it, you are charged for each minute you are connected to the stock quotation service.

Hotline price

◆ The price as of September, 1993, is **$1.00** per minute. If the price per minute changes, you will be notified when you use the **900 Hotline** number to dial the stock quotation service.

Time to retrieve quotations

◆ The time and therefore the total cost to receive stock prices from the Hotline vary depending upon your modem speed, computer system, and the time of day. The stock quotation service is busier at some times than others (most noticeably during stock market opening and closing times), so you may be on the 900 line longer at these times.

Special telephone number conditions

◆ The Hotline number is preset in Quicken Quotes. However, if you are calling from a business, have call waiting, or have 900 number calling blocks, you may have to use special prefixes or make special arrangements. See First Aid For Common Problems

Lookup Symbol Service price

The Quicken Quotes **Lookup Symbol** feature is an online service. As of September, 1993, you are charged $1.00 per minute for this service when using the **Quicken Quotes Hotline 900 number**. CompuServe basic service members are not charged for this service when using Quicken Quotes with their CompuServe account.

SEE ALSO

CompuServe Account
Setting up Quicken Quotes
Looking up Symbols Online

CompuServe Account

If you are already a CompuServe user, you can use a **CompuServe basic services account** with Quicken Quotes.

CompuServe charges and fees

◆ There is no extra charge beyond your ordinary CompuServe fee, because stock quotes are part of CompuServe's basic service. If you use CompuServe, but do not have a basic services account you may be charged a per quote fee. If in doubt, verify your CompuServe account type with CompuServe.

Questions about CompuServe accounts

◆ If you already have a CompuServe account and have questions about using the service, you may inquire online using the command (**GO FEEDBACK**), or you may telephone the CompuServe Customer Service Department at (800) 848-8990.

◆ If you would like to become a member of the CompuServe Information Service, call (800) 848-8199. Both numbers are tollfree in the United States. Outside the U.S. dial (614) 457-8650. See the CompuServe introductory membership brochure enclosed in the Quicken Companion box.

CompuServe Service Agreement Terms

◆ Access to CompuServe whether through the Quicken Quotes Hotline 900 number, or through your own CompuServe account is provided "as is" and is subject to the CompuServe Service Agreement Terms and Operating Rules as stated in the CompuServe Service Agreement Terms in Part 3 of the Quicken Companion User's Guide.

SEE ALSO

First Aid For Common Problems
Quicken Quotes Hotline 900 Phone Number
Setting up Quicken Quotes

Credits

Quicken Quotes Product Team

Development

Claudia Carpenter
Mario Chaves
Stacy Doerr
Eric Dunn
Terry Gomes

Manual and Help

Barbara Formby

Product Marketing

Deborah Whitman

Quality Assurance

Leona Guthrie
Jeff Roodman

SCM

Eleanor Mayfield

Technical Support

Jill Baird

Quick Start

Setting up Quicken

Click on the following topics to learn about Quicken Quotes and how to use it in three quick steps.

A Brief Introduction

Read this brief introduction to learn about Quicken Quotes, the Quotes Hotline, and CompuServe accounts.

Quick Start Steps

Quick Start gives you three quick steps that show you how to enter ticker symbols, retrieve prices, and send updated prices to Quicken.

Setting up Quicken

See the other help topics listed under **Help Contents** for detailed information about Quicken Quotes features.

Setting up Quicken

If you want to do Quick Start later, click the Contents **button on this Help window to return to Help Contents**

A Brief Introduction to Quicken Quotes

Welcome to the Quicken Quotes online stock price quotation program and service.   Here's why you use Quicken Quotes:

◆ Use it to retrieve stock, mutual fund, option and index prices.

◆ As a Quicken user, you can send prices to Quicken 3 for Windows to update your **Investment Account**.   Also, you can send your **Security** list of stock symbols from Quicken to Quicken Quotes.

◆ You can start Quicken Quotes from Quicken 3 for Windows or from the Windows desktop. All you need is your computer, a modem, a telephone line, and Quicken Quotes running in Windows 3.1.

◆ You can retrieve online stock prices using either the **Quicken Quotes Hotline** or a **CompuServe basic services account** (if you are a CompuServe user).

 Setting up Quicken

Quicken Quotes is an independent application that runs on Microsoft Windows. Like other Quicken Companion products it can be installed independently of Quicken and can be started from Windows or from Quicken.

 Setting up Quicken

When you've finished reading the introduction, click the Back button on this Help window to return to Quick Start.

Quick Start Steps

Follow these three quick steps to enter stock ticker symbols, retrieve stock prices, and send prices to Quicken.

Setting up Quicken

To use Quicken Quotes you must have a 100% Hayes-compatible internal or external modem. Before you start, be sure your modem is properly connected and turned on.

First, open Quicken Quotes by clicking the Quicken Quotes icon in the Quicken iconbar or double-clicking it in the program group window.

STEP 1: Enter Ticker Symbols

Quicken Quotes gives you a Base Set of ticker symbols to get you started.   There are two quick ways to add symbols to this set:

✔ Click the **New** button, type the symbol in the **Symbol** box, and then click **OK**.

   Or

✔ Click the **Get Symbols From Quicken** button to make all stock symbols in your Quicken **Security** list part of your **Base Set**.

STEP 2: Retrieve Stock Prices

Quicken Quotes is preset to use the Quicken Quotes Hotline 900 phone number service to dial CompuServe and retrieve quotes.   If you want to use your CompuServe account instead, click the Modem Settings button and change the appropriate options on the Modem Settings dialog box.

✔ Click the **Retrieve Stock Prices** button, and then follow the instructions on the screen.

Quicken Quotes dials the quotation service then displays a notice telling you about Hotline charges.   A message briefly displays the name of each stock as it's price is retrieved.

When all   quotations are retrieved, Quicken Quotes disconnects from the quotation service.   The stock prices and other related information are displayed in the **Stock Symbols** display panel in the Quicken Quotes main window.

STEP 3: Send Stock Prices to Quicken

✔ Click the **Send Prices to Quicken** button to update your Quicken investment account.

📞 *QUICKEN QUOTES HOTLINE*

See your **Quicken 3 for Windows User's Guide** for full information about Quicken investment accounts and the **Security** list.

📞 *QUICKEN QUOTES HOTLINE*

Shortcuts
Looking up Symbols Online

📞 *QUICKEN QUOTES HOTLINE* **When you've finished reading these steps, click the Back button on this Help window to return to Quick Start, or click the Contents button to go to Help Contents**

Starting and Exiting Quicken Quotes

You can start Quicken Quotes either from within Quicken 3 for Windows, or from the Windows desktop.

If you used **Express installation** to install Quicken Quotes and you have Quicken 3 for Windows installed on your computer:

- ◆ The Quicken Quotes icon is added to the Quicken iconbar
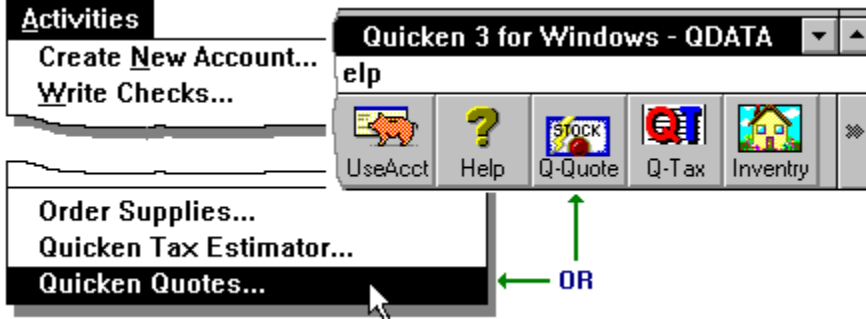- ◆ Quicken Quotes appears as a command on the Quicken **Activities** menu.

Starting Quicken Quotes

Exiting Quicken Quotes

Starting Quicken Quotes

To start Quicken Quotes from Quicken:

✔ **From the Activities menu**: Choose the **Quicken Quotes** command.

Or

From the iconbar: Click the Quicken Quotes icon.

To start Quicken Quotes from Windows

Open the program group where you installed Quicken Companion, and then double-click the Quicken Quotes icon.

Exiting Quicken Quotes

Exiting Quicken Quotes

To exit Quicken Quotes:

☎ QUICKEN QUOTES HOTLINE Click the Quicken Quotes **Exit** button.

☎ QUICKEN QUOTES HOTLINE Choose the **Close** command from the window **Control** menu, or double-click the **Control** button.

☎ QUICKEN QUOTES HOTLINE

Starting Quicken Quotes

Setting up Quicken

If you are using Quicken Quotes to update stock prices in a Quicken 3 for Windows investment account, you need to prepare Quicken to:

◆ Send ticker symbols to Quicken Quotes

◆ Receive updated stock prices

Set up a Quicken investment account:

QUICKEN QUOTES HOTLINE If you do not already have a Quicken **investment account**, create one in Quicken 3 for Windows.

QUICKEN QUOTES HOTLINE

If you are not familiar with investment accounts, see your Quicken 3 for Windows User's Guide to learn how to create an investment account and enter stock transactions.

Set up a Quicken Security list:

QUICKEN QUOTES HOTLINE To set up your **Security** list, choose **Security** from the **Lists** menu to display the **Security List** dialog box.

QUICKEN QUOTES HOTLINE Enter the names and ticker symbols of the stocks, mutual funds, and options whose prices you want to track.

QUICKEN QUOTES HOTLINE

For prices to appear in the **Portfolio View** window, click the **Mark** button until the **Display** column is set to **Always**.

QUICKEN QUOTES HOTLINE Click **OK** when you've completed your entries.

TIP

Be sure you've entered ticker symbols in your Quicken **Security** list that are the same as those commonly used by major stock exchanges and by CompuServe. The ticker symbol on your **Security** list is particularly important because Quicken Quotes uses it to retrieve stock prices and send them back to Quicken.

Setting up Quicken Quotes

QUICKEN QUOTES HOTLINE Start Quicken Quotes from Quicken or from Windows to display the Quicken Quotes main window. (See <u>Starting Quicken Quotes</u> if you don't know how to start Quicken Quotes.)

TIP

> If you have been using a previous version of Quicken Quotes and want to retain your old symbol file, move or copy your **QQUOTE.DAT** file to the same directory as Quicken Quotes before you open Quicken Quotes for the first time.

To set up Quicken Quotes:

◆ Verify your modem and login settings on the **Modem Settings** dialog box and make any necessary changes.

Entering Modem and Login Settings

◆ Modify your ticker symbol **Base Set** (provided with Quicken Quotes) as necessary by adding new symbols or deleting unwanted ones.

Using Ticker Symbols

QUICKEN QUOTES HOTLINE

Setting up Quicken

QQUOTE.DAT Symbol File Version 1.0

Entering Modem and Login Settings

All modem and login options are preset with the most common values.   However, before you use Quicken Quotes for the first time, you should verify that the preset values are correct for your use.

QUICKEN QUOTES HOTLINE
For best results, use a modem that is **100% Hayes compatible**. (Modems manufactured by the Hayes company are often used as a standard by other modem manufacturers.)

QUICKEN QUOTES HOTLINE Click the **Modem Settings** button to display the **Modem Settings** dialog box.

Modem Settings...

QUICKEN QUOTES HOTLINE Make the appropriate changes to one or more of the following options.

Port and Speed
Tone (vs. pulse) dialing
Phone
Initialization String
CompuServe Settings

QUICKEN QUOTES HOTLINE
To return to the default settings, click the **Defaults** button.   (You can open the **Modem Settings** dialog box at any time and use the **Defaults** button to reset all options.)

QUICKEN QUOTES HOTLINE Click **OK** to verify your changes and close the dialog box.

QUICKEN QUOTES HOTLINE

Hotline 900 Phone Number
CompuServe Account
First Aid for Common Problems

Modem Port and Speed

To enter modem Port and Speed:

QUICKEN QUOTES HOTLINE From the **Port** drop-down list, select the number for your modem port.

TIP

> If you are unsure which port to select try **COM1** first. If you have a mouse that uses **COM1**, try **COM2**, or ask your computer dealer to which port your modem is attached.

QUICKEN QUOTES HOTLINE From the **Speed** drop-down list, select the appropriate modem speed (baud rate).   Your choices are **300**, **1200**, **2400**, and **9600** (the higher the number, the faster your modem transmits and receives data).

QUICKEN QUOTES HOTLINE

> The baud rate you select depends on the capability of your modem.   Check your user's manual if you're not sure how fast your modem can transmit and receive data.

Tone (vs. pulse) Dialing

To set Tone (vs. pulse) dialing:

If you're using a rotary-dial phone, clear the **Tone** checkbox.   If you're using a touchtone phone you don't need to change this setting.

Phone Setting

To enter the dial-in Phone number (if necessary):

This setting is preset with the **Quicken Quotes Hotline 900 Phone Number**.   You don't need to make changes to use the Hotline, unless one of the following conditions apply to your telephone service:

◆ **Outside line**: If you are dialing from inside a business, you may need to add a **9** or **8** outside-line prefix.

For example, with a **9** prefix, the number would be: **9 1 900 680 2964**.

◆ **Call waiting**: If you have call waiting on your telephone, you should add a ***7,** prefix (star, seven, comma) to turn off this feature.

For example, with a ***7,** prefix, the number would be: ***7, 1 900 680 2964**.

◆ **900 number call blocking**:   Telephone companies offer "900 number blocks" to prevent anyone from calling a 900 number from your telephone. Some companies automatically block 900 calls unless you authorize removal of the block.

If a block is present and you try to dial a 900 number by phone, you usually get a recording telling you that the 900 number you're calling is blocked. However, when you dial by modem you may not receive a warning. If you think you may have a 900 block on your phone service, contact your telephone company to remove the block.

◆ **CompuServe Account**:   If you want to use your own CompuServe account instead of the Hotline, click in the **Phone** box, delete the 900 phone number, and then enter your CompuServe dial-in number.

TIP

If you need to change the 900 number to add a prefix, click in the **Phone** box, select the number, and then make the necessary changes. If you ever want to use the preset number again, click the **Defaults** button.

Initialization String

To enter the Initialization String (if necessary):

Quicken Quotes works correctly for most 100% compatible Hayes modems without an initialization string. However, if you experience difficulty communicating you may need to set an initialization string for your modem.

To find what out what initialization codes you need, refer to the user's manual for your modem.

QUICKEN QUOTES HOTLINE To enter an initialization string, click in the **Initialization String** box and then type the appropriate string for your modem. (Most modem commands begin with the prefix **AT**.)

CompuServe Settings

To enter your CompuServe ID:

The **CompuServe ID** and **Password** boxes are preset for the **Quicken Quotes Hotline 900 Phone Number**. You don't need to make any changes to use the Hotline.

QUICKEN QUOTES HOTLINE If you want to use your own CompuServe account, enter your user ID and password in the **CompuServe ID** and **Password** boxes. Don't forget to change the **Phone** option to your local CompuServe dial-in number.

QUICKEN QUOTES HOTLINE
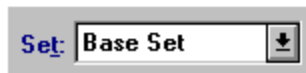
Phone Setting

Using Ticker Symbols

You create and use one or more sets of "ticker symbols" to retrieve online stock quotations. Ticker symbols appear in the **Stock Symbols** display panel in the Quicken Quotes main window.

The current symbol set is always shown in the Set list box.

☎ *QUICKEN QUOTES HOTLINE*

Quicken Quotes comes with one preset **Base Set** of symbols: **DJ 30** (Dow Jones 30, the industrials) **Intu** (Intuit Inc) and **SP 500** (Standard and Poors 500).   When you create a new symbol set, the preset symbols are added to the set. Of course, you can delete the preset symbols if you wish.   You can use only one set for all your symbols or create as many separate sets as you need.

About Ticker Symbols

Creating and Managing Symbol Sets

Entering ticker symbols

You can enter ticker symbols three ways:

◆ Use the **Get Symbols From Quicken** button to import stock symbols from your Quicken Security list.

Getting ticker symbols from Quicken

◆ Use the **New** button to type in symbols.

Adding and deleting ticker symbols

◆ Look up symbols online using the Quicken Quotes Lookup Symbol feature and add them to a Quicken Quotes symbol set.

Looking up ticker symbols online with the Lookup Symbol feature

DEFINITIONS

Ticker Symbol: A ticker symbol is a letter combination that identifies a stock-exchange security. Often, it is the truncated or abbreviated name of the company or group issuing the security, like INTU (Intuit), NOVL (Novell), or DJ 30 (Dow Jones 30).

☎ *QUICKEN QUOTES HOTLINE*

Using the QQUOTE.DAT Symbol File From Quicken Quotes Version 1.0

About Ticker Symbols
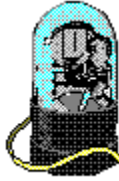
The term "ticker" is a holdover from the days when stock market quotations were recorded on a paper tape and transmitted by a telegraphic device that ticked.

A ticker symbol is a letter combination that identifies a stock-exchange security. Often, it is the truncated or abbreviated name of the company or group issuing the security, like INTU (Intuit), NOVL (Novell), or DJ 30 (Dow Jones 30).

In Quicken Quotes, you create and use one or more sets of ticker symbols to retrieve online stock quotations. Before you create your symbol sets, consider these important points about ticker symbols and stock prices:

- ◆ **Available symbols**: Quicken Quotes, through CompuServe, provides access to approximately 6000 stocks listed on the New York and American stock exchanges, 8000 stocks listed on the NASDAQ and OTC exchanges, and most stock options and mutual funds.

- ◆ **Using the exact symbol**: You must enter the exact ticker symbol in Quicken and Quicken Quotes.

- ◆ **Differences in symbols**: In some cases, there may be a difference between ticker symbols shown in the Investor's Business Daily and other sources. If you have difficulty retrieving prices for your symbol, use the Quicken Quotes **Lookup Symbol** feature to search for the symbol by the company name.

- ◆ **Quotation delays**: Stock prices are quoted on a 20-minute delay, or on the closing price (if you retrieve the quotation after the market is already closed). Mutual fund prices are quoted at the previous day's closing price.

- ◆ **Exchange prices**: Prices for stocks traded on the New York and American stock exchanges reflect the most recent composite stock trade (on a 20-minute delay). Prices for stocks traded on NASDAQ reflect the most recent trade or quote (average of bid and ask) available on a 20-minute delay. Quotes (average of bid and ask) are available on additional over-the-counter issues.

- ◆ **Price differences**: If the same stock appears on more than one exchange, there may be a price difference among exchanges. Quicken Quotes reports a composite of those prices.

Creating and Managing Symbol Sets

QUICKEN QUOTES HOTLINE Click the **Manage Symbol Sets** button to display the **Manage Symbol Sets** dialog box. The dialog box lists all your symbol sets in alphabetical order.

Manage Symbol Sets...

To create a new symbol set:

QUICKEN QUOTES HOTLINE Click the **New** button to display the **New Set** dialog box.

QUICKEN QUOTES HOTLINE Type the new set name in the **Set** field and click **OK** to create the set.

QUICKEN QUOTES HOTLINE Click **Done** to close the **Manage Symbol Sets** dialog box.

To rename an existing symbol set:

QUICKEN QUOTES HOTLINE Select the appropriate set in the **Manage Symbol Sets** dialog box.

QUICKEN QUOTES HOTLINE Click the **Rename** button to display the **Rename Set** dialog box.

QUICKEN QUOTES HOTLINE In the **Set** box, edit the existing name or type a new one and click **OK**.

QUICKEN QUOTES HOTLINE Click **Done** to close the **Manage Symbol Sets** dialog box.

To delete a symbol set:

QUICKEN QUOTES HOTLINE Select the appropriate set in the **Manage Symbol Sets** dialog box.

QUICKEN QUOTES HOTLINE Click the **Delete** button and then confirm the deletion. You cannot delete a set if you only have one set remaining.   (Remember, deleting a set also deletes all ticker symbols in the set.)

About sets

◆ When you add or delete a symbol (using the new or delete buttons on the main window) only the current set (shown in the Set list box) is affected.

◆ When you delete a set it has no affect on the other sets.

◆ A symbol can be in more than one set.

QUICKEN QUOTES HOTLINE

You might want to keep separate symbol sets to track all your securities once a month.   You can have a subgroup of symbols to track once a week (or more frequently).   You can save connection time for the weekly update by keeping a small set called "Weekly."

Getting Ticker Symbols From Quicken

To get symbols from Quicken, you must have an existing investment account and **Security** list. Your **Security** list must contain the correct ticker symbols as used by the major stock exchanges

QUICKEN QUOTES HOTLINE Click the **Get Symbols From Quicken** button to update your current symbol set.

Get Symbols From Quicken

If this is the first time you have gotten symbols from Quicken or if you have added new ticker symbols to your Quicken **Security** list since the last time you updated, Quicken Quotes adds the new symbols to your current symbol set in alphabetical order.

QUICKEN QUOTES HOTLINE

Setting up Quicken

Adding and Deleting Ticker Symbols

You use the **New** and **Delete** buttons in the Quicken Quotes main window to add new symbols or delete unwanted symbols from a symbol set.

Click to add or delete symbols from your current set

To add a symbol:

From the **Set** list-box, select the symbol set you want to change.

Click the **New** button to display the **New Symbol** dialog box.

Enter the ticker symbol in the **Symbol** field, and then click **OK**. You can use either uppercase or lowercase letters when you type in the symbol.

To delete a symbol:

From the **Set** list-box, select the symbol set you want to change.

Select the symbol or symbols you want to delete.

Click the **Delete** button.

If you want to rename a symbol, delete it, and then add it again with the new name.

Creating and Managing Symbol Sets

Looking Up Ticker Symbols Online

You use the Quicken Quotes online **Lookup Symbol** feature to log into CompuServe and look up ticker symbols:

◆ The **Lookup Symbol** feature is an online service. You are charged $1.00 per minute for this service when using the **Quicken Quotes Hotline 900 number**. CompuServe basic service members are not charged for this service when using Quicken Quotes with their CompuServe account.

◆ To look up a symbol, you type the partial name of the company, stock, or security in the **Lookup Symbol** dialog box.   Then you perform an online search for "matches" to the name you specified.   When Quicken Quotes gives you a list of matching symbols you select the symbols you want to add to your current symbol set.

Using the Lookup Symbol button and dialog box

Selecting symbols from the Symbol Lookup Results dialog box

☎ QUICKEN QUOTES HOTLINE

Using Ticker Symbols

Lookup Symbol button and dialog box

QUICKEN QUOTES HOTLINE Click the **Lookup Symbol** button to display the **Lookup Symbol** dialog box.

QUICKEN QUOTES HOTLINE Enter the company name.

QUICKEN QUOTES HOTLINE

The search facility works by searching for company names that match the first part of the name you type in this box. You don't need to type the entire name; just the first word or abbreviation is sufficient, for example, try "International" or "Intl."   Also, the online database may abbreviate the company name arbitrarily.   For example, T. Rowe Price might be under T Rowe or Rowe or Price. Try variations until you find the right company.

QUICKEN QUOTES HOTLINE Select the symbol types for which you want to search. You can select as many as you'd like, for example, you might select both **Stocks** and **Stock Options**.

QUICKEN QUOTES HOTLINE Click the **Look Up** button.

QUICKEN QUOTES HOTLINE

If you are using the Quicken Quotes 900 number, you will see a message that explains the service and its charges each time you use the **Lookup Symbol** feature until you turn the message off. If you do turn it off, you will see the message again only if the cost of the service changes. Select the **Click here...** checkbox if you do not want to see this message again unless the cost of the service changes. Then click **OK**.

QUICKEN QUOTES HOTLINE Quicken Quotes dials the service and connects to CompuServe.

QUICKEN QUOTES HOTLINE

Again, if you're using the 900 Hotline number, you see a second message about the service and its charges (unlike the message described in step 4 above, you will always see this message). **Don't click** the **Cancel** button unless you want to cancel the search.

QUICKEN QUOTES HOTLINE When the search is complete, you see the **Symbols Found** dialog box, which tells you how many symbol matches the search found.
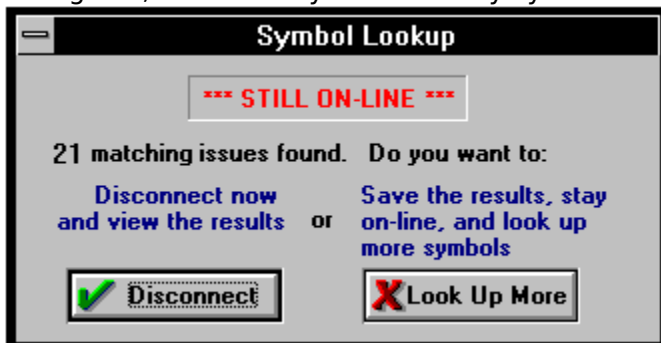
QUICKEN QUOTES HOTLINE You can disconnect now to view the results or save the results and stay online to look up additional symbols:

✓ Click **Look Up More** to save the current results and return to the Lookup Symbol dialog box so you can enter the next company name.

or

✓ Click **Disconnect** to disconnect and view the current results. Quicken Quotes takes a moment or so to disconnect, and then you see the **Symbol Lookup Results** dialog box.

Selecting symbols from the Symbol Lookup Results dialog box

Symbol Lookup Results Dialog Box

The symbols shown in this dialog box are the symbols found by the Quicken Quotes **Lookup Symbol** service.   From this dialog box, you select symbols to include in your current symbol set.

To select symbols and include them in your current symbol set:

QUICKEN QUOTES HOTLINE Be sure the symbol set shown in the **Set** list box (on the **Symbol Lookup Results** dialog box) is the one to which you want to add these symbols, and change it if necessary.

QUICKEN QUOTES HOTLINE Select all the symbols that you want to include in your current symbol set.

QUICKEN QUOTES HOTLINE Click the **Add Selected Symbols to Set** button.

QUICKEN QUOTES HOTLINE

Quicken Quotes adds the symbols to the current set. You can add selected symbols to more than one set if you wish. Change the current set, modify the selection if necessary, and then click the **Add Selected Symbols to Set** button.

QUICKEN QUOTES HOTLINE

Some typical descriptions you might see in the **Issue Description** field in the **Symbol Lookup Results** dialog box are:
Call Aug 93 $5 = A stock option
Put Aug 93 $5 = A stock option
Com = Common stock
Wt = Warrant
Lg-TM = Long-term option

QUICKEN QUOTES HOTLINE

Lookup Symbol button and dialog box

Retrieving Quotations

If you are using Quicken Quotes to update prices in a Quicken investment account:

◆ Be sure Quicken is prepared to send ticker symbols and to receive updated stock prices, see Setting Up Quicken.

◆ Before you retrieve quotations you should also verify your Quicken Quotes modem settings if you haven't already done so, see Entering Modem and Login Settings.

To log in and retrieve quotations:

☎ QUICKEN QUOTES HOTLINE At the Quicken Quotes main window, choose the symbol set you want to use from the **Set** list. Quicken Quotes will retrieve quotations for the symbols in your current **Symbol Set**.

☎ QUICKEN QUOTES HOTLINE Click the **Retrieve Stock Prices** button.

☎ QUICKEN QUOTES HOTLINE

If you are using the Quicken Quotes 900 Hotline number, the first time you retrieve stock quotations, you will see a welcome message with information about the Quicken Quotes and CompuServe service and rates.

Click **OK** to continue with the retrieval, or click **Cancel** to stop the retrieval before the telephone connection is made (you will not be charged for a call).

If you don't want to see the message again (unless the cost of service goes up), select the **Click here**... checkbox.

☎ QUICKEN QUOTES HOTLINE Quicken Quotes dials the phone number. When the connection is made, you will see a login notice. There is a slight delay while CompuServe verifies your ID and password.

☎ QUICKEN QUOTES HOTLINE A window shows you each symbol as Quicken Quotes retrieves the information and then Quicken Quotes displays the prices in the Stock Symbols display panel in the Quicken Quotes main window.

In addition to prices, Quicken Quotes also displays other information about the stock symbol, see **About Retrieved Stock Symbol Information**.

About retrieved stock symbol information

About Retrieved Stock Symbol Information

When you retrieve quotations, you also receive the change from the previous day's close, the date, and time; the security high and low, the volume, and news notification.

Prices for stocks, options, and most indices are the most recent prices available (on a 20-minute delay). Mutual fund prices are updated once per day at 7:00 pm Eastern Standard Time.

Definitions

Following are brief definitions for the fields in the **Stock Symbols** display panel in the Quicken Quotes main window. Consult your stock broker if you have questions about stock prices or trading methods.

Stock Symbols

Symbol	Price	Change	Date	Time	High	Low	Volume/News
DJ 30	3640.63	− 7.55	8/27/93	5:01	3656.28	3606.54	---
FRAM	7 3/4	---	8/27/93	3:54	8	7 3/4	224
INTU	31 1/2	+ 1/4	8/27/93	4:00	32	31 1/4	134
SP 500	460.54	− .5	8/27/93	5:00	461.05	459.19	---

◆ **Symbol**: Ticker symbol identification for items traded on exchanges.

◆ **Price**: The price of the security.

◆ **Change**: The difference between the displayed price and yesterday's closing price.

◆ **Date**: The date of the last price update.

◆ **Time**: The time of the last price update (or the time the quotation service was last updated).

◆ **High**: The highest trading value of the current day (for mutual funds, this is the ask price).

◆ **Low**: The lowest trading value of the current day (for mutual funds, this is the bid price).

◆ **Volume**: For stocks, this is the number of shares traded on the current day (in 100's). For options, this is the number of contracts traded during the current day (sometimes preceded by a **Z** to indicate that it is not in 100's of shares). Mutual funds do not show volume.

◆ **News *** : The * indicates that information affecting the stock was received that day on the news wires available via CompuServe. If you are a CompuServe subscriber you can exit Quicken Quotes, and then use the CompuServe Executive News Service. Please note that you pay a surcharge for this service.

Sending Prices to Quicken

After you retrieve quotations, you can send the prices to Quicken. The new stock prices are displayed in the Quicken **Portfolio View** and **Price History** windows.

Before you send prices, Quicken must be set up to receive updated prices from Quicken Quotes:

◆ You must have a security (or securities) in your investment account.

◆ Set your Security list Mark option to Always to assure that prices display regardless of the balance.

◆ The Security list ticker symbol must match the ticker symbol on the Quicken Quotes symbol set.

◆ It doesn't matter how many securities you have in your Quicken Quotes symbol set as long as some of them match corresponding securities in Quicken. See Setting up Quicken.

Sending prices

☎ QUICKEN QUOTES HOTLINE Click the Send Prices to Quicken button.   You see a brief message that Quicken Quotes is sending prices to Quicken.

☎ QUICKEN QUOTES HOTLINE If Quicken is open, Quicken Quotes updates the investment account immediately.   If Quicken is not open, Quicken Quotes opens it, and updates the investment account.

☎ QUICKEN QUOTES HOTLINE

Viewing Updated Stock Prices in Quicken

Viewing Updated Stock Prices in Quicken

QUICKEN QUOTES HOTLINE If you're in Quicken Quotes, click the **Go To Quicken** button to open Quicken.

Go to Quicken

QUICKEN QUOTES HOTLINE From the Quicken **Activities** menu, choose **Portfolio View**. The **Portfolio View** dialog box shows price updates for the appropriate securities in your Quicken investment account.

To see the price history for a selected security:

QUICKEN QUOTES HOTLINE Select the appropriate security, and then click the **Prices** button in the **Portfolio View** dialog box to display the **Price History** dialog box.

To print the stock price history:

QUICKEN QUOTES HOTLINE Click the **Print** button in the **Price History** dialog.

For additional information about **Portfolio View**, investment accounts, and security lists, see your **Quicken 3 for Windows User's Guide**.

QUICKEN QUOTES HOTLINE

See your Quicken 3 for Windows User's Guide for more information about the **Portfolio View** and **Price History** dialog boxes.

Using the Calculator

Quicken Quotes has a handy calculator for quick calculations. You may want to use it after you receive prices to analyze a future buy or sell decision.

QUICKEN QUOTES HOTLINE Click the **Calculator** button to display the Companion Calculator.
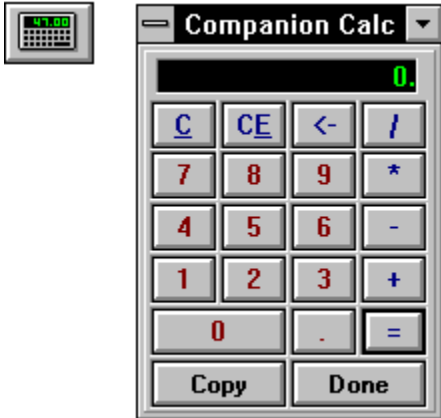
QUICKEN QUOTES HOTLINE Use the calculator keypad as you would a typical hand-held calculator. For example, click **C** to clear the display panel to start a new calculation.

To copy and paste the calculator results:

QUICKEN QUOTES HOTLINE Perform your calculations, and then click the **Copy** button, or press **Ctrl+C**. The result is copied to the Windows Clipboard. You can then paste it into another application if you wish (use **Ctrl+V** to paste).

QUICKEN QUOTES HOTLINE Click **Done** when you've finished your calculations to close the Calculator. Or you can double-click the window Control menu button, or choose **Close** from the window Control menu.

To set Auto Copy and Stay on Top options:

You can set options to keep the calculator always on top of the Quicken Quotes window, and to automatically copy results (so you don't have to click the **Copy** button).

QUICKEN QUOTES HOTLINE From the Calculator's window Control menu, select the **Auto Copy** or the **Stay on Top** option. You can only select one at a time. If you want to select both, redisplay the menu and select the other option.

QUICKEN QUOTES HOTLINE
> A checkmark appears next to the option when it is turned on. To turn the option off, reselect it to clear the checkmark.

QUICKEN QUOTES HOTLINE
> You can minimize the calculator to an icon on the Windows desktop and continue to use it with other applications.

First Aid For Common Problems

This is your Help "first aid kit" for:

◆ **Answering questions**:

As we developed and tested this and previous versions of Quicken Quotes, we accumulated a few "out-of-the-ordinary" questions.   Since the answers to some of these questions may prove helpful to you, they are listed (in no specific order) in the "Questions about Quicken Quotes" topic.   We've also included some "typical" questions that you'll find helpful as well.

Questions About Quicken Quotes

◆ **Solving and troubleshooting problems before you call Intuit Technical Support**:

Many communication "problems" with your modem or telephone service are easily solved.   These can include 900 number call blocking, special prefixes, or correctly using your modem's initialization string.   These problems and their solutions are listed (again, in no specific order) in the "Solving and Troubleshooting Problems" topic.

Solving and Troubleshooting Problems

Questions About Quicken Quotes

QUICKEN QUOTES HOTLINE **To see help for a question, click on the question mark.**

?
How do I use my QQUOTE.DAT symbol file from Quicken Quotes Version 1.0 with Version 2.0?

?
What are the services and charges offered by the Quicken Quotes 900 Hotline?

?
What are the services and charges when I use my CompuServe basic services account with Quicken Quotes?

?
What is the limit to the number of Symbol Sets and Symbols per set I may have?

Using the QQUOTE.DAT Symbol File From Quicken Quotes Version 1.0

If you have been using a previous version of Quicken Quotes your version 1.0 QQUOTE.DAT symbol file automatically becomes your version 2.0 **Base Set**.

If you installed Quicken Quotes 2.0 in a different directory from version 1.0, the original QQUOTE.DAT file is not used for the **Base Set**.   If you want to use your old (QQUOTE.DAT) symbols to create a new symbol set in version 2.0, you can:

Create a new symbol set

Click the Manage Symbol Sets button to display the Manage Symbols Sets dialog box.

Click the New button to display the New Set dialog box.

Type the name you want to use for your new symbol set. This set will have the same symbols as your old QQUOTE.DAT file.

Click OK, and then click Done to close the Manage Symbol Sets dialog box.

Count your current symbol sets

Open the Set list-box.   Count how many sets you have (if you've just installed Quicken Quotes and haven't created any sets, you'll probably have two, the Base Set and your new set.   For example, you may have these sets:

> **Base Set**
>
> **Old Symbols** (the new set you just created which is empty)

Leave Quicken Quotes (exit or minimize).

Rename your old file

Open the Windows File Manager.

Find your old QQUOTE.DAT file and move it to the directory where you installed Quicken Quotes.

Rename the QQUOTE.DAT file to: QQUOTE.Dnn, where nn is the number representing the set you just created.   For example, if you counted two sets in the Set list box, you would rename the file to QQUOTE.D02.   If you counted five sets you would rename the file to QQUOTE.D05.

Verify the changes

Quit File Manager and return to Quicken Quotes.   The new set (Old Symbols) will now contain the symbols from your original QQUOTE.DAT file.

Symbol Set and Symbol Limit

The fixed limit to the number of symbol sets you may have is 25.   You may have approximately 750 symbols per set.

Solving and Troubleshooting Problems

Handling communication problems:

If communication errors occur, Quicken Quotes terminates the connection and displays an alert describing the problem. Before you call Intuit or CompuServe customer support, try these troubleshooting steps one by one in this order:

◆ Check to be sure the modem settings and login options on the Quicken Quotes window are correct.

◆ Check the physical cable and electrical connections of your computer, modem, and telephone line.

◆ Try dialing CompuServe again. Your telephone service may have experienced a temporary interruption due to repairs in the neighborhood or other phone activities.

◆ Try dialing another line that you know works with your modem to be sure the problem is not internal to the modem.

◆ Try turning your computer and modem off for 15-20 seconds.

◆ If you are using Quicken Quotes from inside a business, make sure that your business does not block usage of 900 calls. You can check to see if you have a 900 block by calling the Hotline number directly. If you hear a recorded message, contact your telephone company to remove the 900 block.

◆ Determine if you need to add an outside-line prefix (like **9** or **8**) before the dial-in phone number.

◆ If call waiting on your telephone is disrupting your modem sessions, you can prefix the number with the following: ***7,** (star, seven, comma).

◆ If you experience difficulty communicating at **9600** baud, try selecting a lower baud rate.

◆ If you experience difficulty with "line noise" which may cause a variety of communication problems, check your modem documentation for information about "error correction settings."   You may need to experiment with diferent error correction settings to see which one works best for you.

If you continue to have communication difficulties, call your Intuit or CompuServe customer support representatives.

CompuServe accounts:

If your CompuServe account is set up so that you do not start at the main CompuServe screen, you might try typing **/GO:TOP** after your login in the **CompuServe ID** field.

Shortcuts

Command Line shortcut:

To automatically perform the following sequence when you double-click on the Quicken Quotes group window icon:
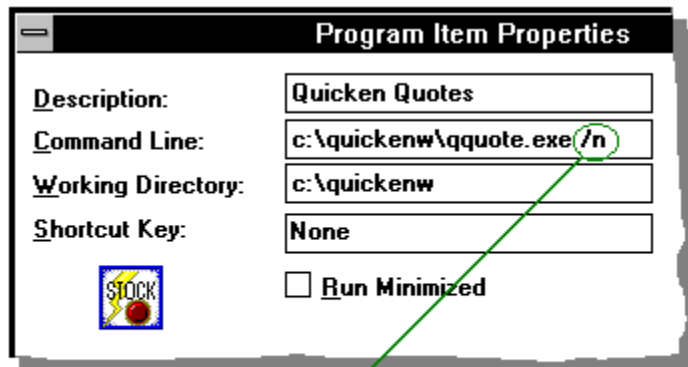
☎ **QUICKEN QUOTES HOTLINE** Open Quicken Quotes

☎ **QUICKEN QUOTES HOTLINE** Retrieve quotes (from whichever symbol set you had open last)

☎ **QUICKEN QUOTES HOTLINE** Open and update Quicken 3 for Windows stock prices

☎ **QUICKEN QUOTES HOTLINE** Close Quicken Quotes

add   **/n** to the Program Manager **File/Properties** for Quicken Quotes as shown in this illustration:

Add this command line option to automate stock price retrieval

Help Button

Getting Help from the Quicken Quotes main window

Click the **Help** button or press **F1** to display Quicken Quotes onscreen Help.   Since you're looking at Quicken Quotes Help right now, you probably know about the help button on the main window.

Getting Help from a Quicken Quotes dialog box

In addition to the Help button on the main window, each Quicken Quotes dialog box has it's own **Help** button.

When you click the **Help** button on a dialog box you get help specifically for that dialog.

About Quicken Quotes Button

Click this button to display the Quicken Quotes version number.