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What's New In Quicken 5 for Windows

This section summarizes the new features in Quicken 5 for Windows, and explains how to access them (shown in *italics*).

Many of the new features are based directly on customer suggestions. Thank you for making Quicken better than ever!

Online services (require a modem)

For a tour of online services, choose QuickTours from the Quicken Help menu, then click "Using Quicken With A Modem." To sign up for online banking or online bill payment, press F1 and click the Search button. Type "financial institutions" and press Enter. Then double-click "Financial institution phone numbers."

- Online banking lets you download account information from your financial institution, and reconcile that information with your Quicken data. If you own a credit card issued by an online banking institution, you can download your credit card transactions, too. *Choose Online Banking from the Online menu.*

  Financial Directory provides information about many of the financial institutions that participate in online banking. *Choose Financial Directory from the Online menu.*

- Online bill payment lets you pay your bills through a modem. (If you are currently a CheckFree user, you can continue using CheckFree or switch to online bill payment.) *Choose Online Bill Payment from the Online menu.*

- Quicken Financial Network provides free access to the Quicken area on the World Wide Web. *Choose Quicken Financial Network from the Online menu.*

- Portfolio Price Update now retrieves high, low, volume, and change information for the securities in your Quicken investment portfolio. *Click Update from the Portfolio View.*

- Through online banking, download your Quicken Credit Card transactions anytime you want, as often as you want, instead of just once a month.

Reports

- EasyAnswer reports let you quickly create common reports about your finances. *Choose EasyAnswers from the Reports menu.*

- For reports that have two columns or more, you can resize the width of the columns. *After you create a report, it appears on the screen with small markers between the column headings. Drag the markers to the left or right to resize the columns.*

- Show or hide any report column. *Before or after you run a report, click Customize and then click the Display tab. Under "Show Columns," select the columns you want to show or hide.*

- Organize cash flow reports and summary reports by supercategory. *Set up supercategories for your reports first: choose Category & Transfer from the Lists menu and then click Super. Then click the Reports icon, choose the cash flow or summary report, and then click Create. Click Customize and then click the Display tab.*

Under "Organization," choose Supercategory.

- The Reports menu shows the names of the last four reports you created.

Report printing

- Print a report on a single page, no matter how wide the report is. *Create a report, click the Print icon, and then select "Fit to One Page Wide."*
- The Print Preview window shows more of your report, in the actual font it will be printed in. *Create a report, click Print, and then click Preview. Click any part of a report (the cursor is a magnifying glass) to magnify it.*
- Change the report orientation (portrait or landscape) right in the Print Report window, without having to go through Printer Setup. *Create a report, and then click Print.*

Getting around in Quicken

- QuickTabs let you quickly move between the areas of Quicken you use the most. *Choose Options from the Edit menu, and then click General. Click "Full-Window Mode."*
- The newly-designed HomeBase provides one-screen access to Quicken's most important features. *Choose HomeBase from the Activities menu.*

Investments and Portfolio View

- If you've never used Quicken to track investments, EasyStep helps you get started. *Choose Set Up Investment from the Activities menu, or click the Set Up Investment button in the Portfolio View.*
- You can link an investment account to a bank account that lets you hold uninvested cash and write checks. *Choose Account from the Lists menu. Select the investment account you want to link the checking account to, and then click Edit. Check "Include a Linked Checking Account for Cash Management."*
- You can specify these new investment actions: transfer shares between accounts, corporate name change, corporate securities spin-off, corporate acquisition (stock for stock), and stock dividend. *From the investment register, click Action, and then click Advanced.*
- To track the price history of an investment you may not necessarily own, add it to the Watch List. *From the Portfolio View, click Options, and then click Securities. Select a security, and then click Watch List.*
- In the Portfolio View, sort your investments by security name, type, symbol, or any of the Custom View columns (like market value, estimated income, and % market value), just by clicking the heading.
- Specify high, low, and volume for any investment price. *From the Portfolio View, choose the security, click Prices, and then click New.*
- When you specify the lot (or portion) of shares to sell or remove, you can choose "First Shares In," "Last Shares In," "Maximum Gain" (the shares that will give you maximum tax consequences), or "Minimum Gain" (the shares that will give you minimum tax consequences). *From the Sell or ShrsOut investment form, enter the number of shares to sell or remove, and then click Lots.*
- When you add shares to an account or remove shares from an account, you have the option of specifying the market value of the shares if it's different from the cost basis (this affects investment

performance reports). *From the ShrsIn or ShrsOut investment form, enter the Market Value.*

Account register

- The category drop-down list lets you enter split transactions and transfer transactions right from the drop-down list itself. *Choose Use Register from the Activities menu, and then tab to the Category column.*

- The Edit, Record, and Splits buttons are now located closer to the transaction you're entering. (Restore now appears under Edit.) *Choose Use Register from the Activities menu.*

Scheduled transactions

- You can sort the Scheduled Transaction list by description, amount, or next date. *Choose Scheduled Transaction from the Lists menu. Under "Sort by," choose your preference.*

Memorized transactions

- You can automatically delete memorized transactions that you haven't used in a number of months. *Choose Options from the Edit menu, and then click General. The option is called "Remove Memorized Transactions..."*

Tax planning

- With Tax Link Assistant, manage your tax schedule assignments for all categories in one window. *Choose Category & Transfer from the Lists menu, and then click Tax Link.*

- If you file multiple copies of a tax form (for example, if you own two businesses and file two copies of Schedule C), you can specify which copy of the tax form a transaction should be assigned to. *Choose Class from the Lists menu, and click New. Set up a class called "Business 1" and type "1" for the Copy number. Set up a class called "Business 2" and type "2" for the Copy number. Then when you enter a transaction in the register, you can specify the class in the Category field by entering the category first, then typing a forward slash (/), followed by the class name.* You can also use this procedure to specify multiple copies of tax forms you receive, such as if you have two jobs and receive two W-2 forms.

Loans

- Improved View Loans window organizes your loan information into Loan Summary, Payment Schedule, and Payment Graph tabs. The View Loans window also now shows the final payment date. *Choose Loans from the Activities menu.*

- EasyStep helps you set up your loans in Quicken. *Choose Loans from the Activities menu, and then click New.*

- Easily enter additional payments. *Choose Loans from the Activities menu, click Make Payment, and then click Extra.*

Onscreen assistance

- With flyover Help, move your mouse cursor over any Quicken icon for a few seconds to learn what the icon does.
- Get the big picture on common Quicken tasks with the newly-designed QuickTours. *Choose QuickTours from the Help menu.*
- Get answers to the most frequently asked questions about Quicken. *Press F1, click Contents, and then click Troubleshooting.*
- Quicken Tips provide useful suggestions whenever you start Quicken. *Choose Quicken Tips from the Help menu.*

Other improvements

- Add categories from Quicken's Home category list or Business category list to customize your own category list. *Choose Category & Transfer from the Lists menu, and then click Add.*
- Hide inactive accounts without having to delete them. *Choose Account from the Lists menu, select an account, and then click Hide.*
- Improved continuous-feed printer check alignment lets you line up checks in your printer faster and easier than before. *Choose Printer Setup from the File menu, and then choose Check Printer Setup.*
- Create and save multiple budgets. *Choose Budgeting from the Plan menu, and then click Budgets.*
- The File menu shows the names of the last four Quicken files you opened.