



Cheat Sheet

Quicken 2014 For Dummies

From [Quicken 2014 For Dummies](#) by Stephen L. Nelson

If you're an investor (particularly a small business owner or real estate investor) or an individual dealing with personal finances, Quicken 2014 can simplify your life. Check out this information and insight into a financial recordkeeping tool that's popular around the world.

Windows Tips for Quicken 2014 Users

Quicken and Windows programs play well together. Several common Windows tricks help make your use of the Quicken 2014 financial recording tool easier and faster.

- To move quickly to list box entries that begin with a particular letter, press the letter.
- To select a list box entry and choose a dialog box's suggested command button, double-click the entry.
- To move the insertion bar to the beginning of a field, press Home.
- To move the insertion bar to the end of a field, press End.
- To close a window or dialog box, click its Close button in the upper-right corner. (The *Close button* is the little box with an X in it.)
- To *minimize* a window, which shrinks it into a tiny little picture, Windows users click the first button in the upper-right corner — the one that looks like an underline. (Windows then places the minimized program on the taskbar.)
- To maximize the Quicken desktop so that it fills the entire monitor screen, click the middle button in the upper-right corner of the application window if the button shows one window. If the middle button shows two windows, the desktop is already maximized. For previous Windows versions, click the up arrow in the application's upper-right window. You can also click on the title bar.
- To do a Help yelp, press the F1 key. This key works just about anywhere. Don't press it in a crowded theater, though.
- To start another application in Windows 7 or earlier, click the Start button.

Use the Start screen if you are using Windows 8.

- To switch to another application, click its button on the taskbar.
- To change any document's window size, position the mouse pointer on the window border and then click and drag the border. (If you can't see the border because the window's been maximized, click the middle button — with the two windows in it — in the upper-right corner.)

Quick and Easy Date Editing in Quicken 2014

Quicken 2014 gives you some handy date-editing tricks. Whether you're using Quicken Starter Edition, Quicken Premier, Quicken Home & Business, or Quicken Rental Property Manager, you may enter dates when you write a check, record a deposit, reconcile an account, or receive a dividend on some investment. If the selection cursor is in a Date field, you can do these things:

| Press This Key | What Happens |
|----------------|---|
| + | Adds one day to the date shown. |
| - | Subtracts one day from the date shown. |
| t | Changes the date to today's date. You can remember this because <i>t</i> is the first letter in <i>today</i> . |
| y | Changes the date to the first date in the year. Note that <i>y</i> is the first letter in <i>year</i> . |
| r | Changes the date to the last date in the year. Note that <i>r</i> is the last letter in <i>year</i> . |
| m | Changes the date to the first date in the month. Just to salve my compulsive personality, allow me to point out that <i>m</i> is the first letter in <i>month</i> . |
| h | Changes the date to the last date in the month. Okay, last time I'll provide a memory tool — note that <i>h</i> is the last letter in <i>month</i> . |

Quicken 2014 Tasks Every User Should Know About

Working with a robust financial record-keeping software program like Quicken 2014 can present some challenges. The Quicken software has so much to offer. Here are four tasks that every Quicken user should perform on a regular

basis:

- Set up Quicken bank accounts for all your checking, savings, and money market accounts — and then use the Quicken software to carefully track the money that flows into and out of these accounts. Maintaining even just this simple cash accounting system lets you more easily monitor your finances, budget for the future, and identify money-saving tax deductions.

Small businesses and rental property investors: The Home & Business and Rental Manager versions of Quicken let you easily set up and run simple cash-based accounting systems for a home-based business and for real estate investments. Use these great tools if you're a real estate investor or business owner!

- Use the Retirement Calculator to estimate when and how you can retire. Especially with the financial meltdown in the last decade, people need to get more proactive both about saving for and planning for retirement. To use the Retirement Calculator, display the Planning tab, click the Planning Tools button, and choose the Retirement Calculator command.

Invest some time in figuring out how to really economize on your investment-related costs because these costs (mutual fund expense ratios, financial advisory fees, trading costs, and so on) can eat away at your profits in a fashion that most amateur investors don't understand.

- Create a category list that makes tracking your spending and tax deductions easy. Within Quicken, you organize your financial information using income and deductions categories.

Any stream of income you want to separately track or monitor requires its own category. And any expense that you want to regularly tally — perhaps the expense represents a tax deduction — also requires its own category. You can set up categories by choosing Tools→Category List.

- Balance bank accounts each month with only a few minutes of effort by clicking the Actions button and then choosing the Reconcile command. (The Actions button appears in the upper-right corner of the Quicken window whenever a bank register shows.) Reconciling a bank account lets you catch and correct bookkeeping errors with your accounting records.

Time-Saving Quicken 2014 Shortcuts

You can save time working with Quicken 2014 by using and memorizing the keyboard shortcuts listed in the following table. Although learning to use Quicken keyboard shortcuts requires memorization work upfront, the effort usually pays back rich dividends in data entry time savings.

| Shortcut | Why You Want to Remember This |
|-----------------|---|
| Ctrl+S | Displays the Split Transaction window (so that you can use more than one category to describe a payment or deposit). |
| Shift+Delete | Cuts out the selected text in a field and moves it to the Windows Clipboard (so that you can paste it into some other field). |
| Ctrl+Insert | Copies the selected text in a field to the Windows Clipboard (so that you can paste it into some other field). |
| Shift+Insert | Pastes what's on the Clipboard into the selected field. |
| Ctrl+P | Prints the contents of the active window. (Well, almost always.) |
| F1 | For those times when you just have to say, "Aaagh! Help! Help!" |
| F11 | Maximizes register view. |
| Ctrl+O | Lets you open another Quicken data file. |
| Ctrl+G | Go to date. |
| Ctrl+K | Displays the financial calendar. |
| Ctrl+B | Puts you on the fast track to backing up your data. |
| Ctrl+A | Displays the Accounts List window. |
| Ctrl+W | Displays the Write Checks window. |
| Ctrl+L | Displays the tag list. |
| Ctrl+T | Displays the memorized Payees list. |
| Ctrl+J | Displays the scheduled transactions list. |
| Ctrl+U | Displays the Portfolio View window. |
| Ctrl+V | Allows you to void a transaction. |
| Ctrl+Y | Displays the security list. |
| Ctrl+H | Displays the Find and Replace window. |

5 Free Websites Quicken 2014 Users Can Rely On

The web shares lots of information about personal finance, small business, and tax accounting that Quicken users can appreciate. If you're a small

business owner, investor, and or person just beginning your research, however, you may not be sure which websites offer the most up-to-date and dependable information.

Here are five sites that provide reliable, useful information:

| Site | Why It's Useful |
|--|--|
| Social Security Administration | The Social Security Administration website lets you estimate your future benefits. (Despite what you sometimes here people say, Social Security will “be there” for future generations. But benefits will probably be scaled back for at least some recipients, which you can read more about at the Social Security Administration’s website. |
| Bogleheads | Basically, the online fan club for Vanguard Group founder John Bogle, this great forum provides tons of investment planning and record-keeping advice—all influenced by a strong belief in the superiority of a passive, low-cost investing |
| Quicken | Find lots of stuff for Quicken.com users, all from the maker of Quicken — Intuit. Note that if you register at the Quicken.com site, you also gain additional functionality within the Quicken program. For example, you can usually download stock price information for free. |
| The IRS | Most people by now know that the IRS website provides downloadable forms and informational booklets. What some people don’t know, however, is that it also provides access to U.S. tax law (both the Internal Revenue Code and the Treasury Regulations). |
| Evergreen Small Business | This author of <i>Quicken 2014 For Dummies</i> has posted several hundred pages of small business, personal financial planning, and tax-related information, including free downloadable copies of many of his old (but still useful) books. |