

Introducing Quicken XG

Whether you are brand new to Quicken or have been using it for years, Quicken XG offers a new look and improved features that will help you get more out of Quicken. It's flexible enough to help you define your financial goals and powerful enough to help you reach them. Based on extensive work with customers, Quicken has been re-engineered. It's now:

- Easier to learn and use
- Integrated with more online services
- Customizable for your specific needs

The following guide will introduce you to the many new features available to you, and get you up and running with your Quicken faster and easier than ever before.

Get Started

What you Need

To use Quicken you need:

- Computer and monitor:
Pentium 133 (Pentium II 300 is recommended) with at least 32 MB of RAM (64 MB is recommended), a hard disk with 54-97 MB of free disk space to install, a double-speed CD-ROM drive (4 speed or faster is recommended), and a video card and monitor capable of running 256-colour VGA SVGA (16-bit colour is recommended).
- Windows 95, 98, 2000, Me, XP.
- Microsoft Internet Explorer 5.5 or higher (version 5.5 is included with this software).
- (Optional) You must have Internet access to use Quicken Internet features, including online banking account access. A 14.4 Kbps modem is required (56 Kbps or higher is recommended).
- (Optional) Any printer supported by Windows.
Note: To use all of Quicken features you need to set your screen resolution to a minimum of 1024 x 768 pixels. To change your screen resolution settings:
 - From the windows Taskbar, click Start ► Settings ► Control Panel.
 - Double-click Display, and select the Settings tab.
 - In the Screen area box, move the slider to 1024 x 768 pixels.
 - Click Apply.

Installing Quicken

Unlike some other software programs, you cannot run Quicken from the CD-ROM. You must install Quicken from the CD-ROM onto your personal computer. If you are currently using an earlier version of Quicken and are upgrading to Quicken XG, refer to "Upgrading from an earlier version of Quicken" on page 4.

Installing Quicken for the first time

- 1 Make sure no other applications are open.
Look at the Windows taskbar. If it displays applications other than the Start menu, right-click each one and select Close (save any work). Also, disable any virus protection software.
- 2 Insert the Quicken CD-ROM.
The Quicken install program should run automatically. If it doesn't, from the Start menu choose Run, and then browse to open the install program on your Quicken CD-ROM. Select Start.exe ► Open ► then OK.
- 3 Follow the onscreen instructions.
To move through the installation screens, click Next. If you need help at anytime, click Help.

Upgrading from an earlier version of Quicken

- 1 Validate and backup your current data files.
 - Open your current version of Quicken and select File Operations from the File menu.
 - Choose Validate and select the Quicken data file you want to validate.
 - From the File menu, choose Backup and follow the onscreen instructions.
You can save your files to disk, CD, or use the Quicken Online Backup service: a data storage service that will automatically backup data files from your computer to a secure off-site data centre via the Internet. Visit www.quickenbackup.ca for details.
 - Once you have validated and backed up all the Quicken data files you intend to upgrade, you are ready to install Quicken XG.
- 2 Make sure that no other applications are open.
Look at the Windows Taskbar. If it displays applications other than the Start menu, right click each one and select Close (save any work). Also, disable any virus protection software.
- 3 Insert the Quicken CD-ROM.
The Quicken install program should run automatically. If it doesn't, from the Start menu choose Run, and then browse to open the install program on your Quicken CD-ROM. Select Start.exe ► Open ► then OK.
- 4 Follow the onscreen instructions.
Click Next to move through the installation screens. If you need help at any time, click Help.

When you run Quicken for the first time, it automatically finds your existing data file and converts it to Quicken XG's file format. If you have multiple Quicken data files, you need to open each one manually in Quicken XG.

Activating Quicken

When you run Quicken for the first time you are required to activate your Quicken product. Activating Quicken is a fast and easy process, and doesn't collect any personal information about you.

If you are connected to the Internet, type in your installation key (found on the inside cover of your CD-ROM case) when prompted and Quicken instantly activates your product for use on that computer. It's the fastest and easiest way to activate Quicken, and the process is seamless. Within minutes you are up and running.

If you are not connected to the Internet, Quicken will guide you through the process of calling Intuit Direct Sales and Service and activating your Quicken product over the phone.

Getting Help

Before you contact a Product Support specialist, it's recommend that you first search the Quicken Help for information (From the Help menu, choose Contents).

If you can't find what you are looking for in the Help, there are a variety of other options on the Quicken Advantage page. Choose Help menu ► Quicken Advantage. Please note that all pricing and hours of operation are subject to change.

For	Search	During these times
Frequently Asked Questions Quicken's FAQ page provides easy access to updates, utilities, and answers to common questions.	Quicken Advantage Page: Choose FAQs	24 hours a day 7 days a week
Product Support Product support is per call, fee-based support. (Quicken Advantage Members receive 3 FREE one-on-one consultations with membership. Some restrictions apply.)	Call 1-877-844-1515	Monday through Friday 10:00 am to 8:00 pm. EST

What's New

Quicken XG comes with many great new features and services which will help you save time, reduce data entry, and manage your unique financial situation.

Easier to learn and use

Quicken Guided Setup

Interested in saving more money? Want to learn how to track your investments in Quicken? Select your financial goals and Quicken Guided Setup will help you set up Quicken to meet those goals.

After you select your financial goals, Quicken Guided Setup leads you through a personalized set up process so that you set up only the parts of Quicken you need to meet your goals. You can come back to the Guided Setup at anytime just choose Tools Menu ► Quicken Guided Setup.



Redesigned Account Activity Centres

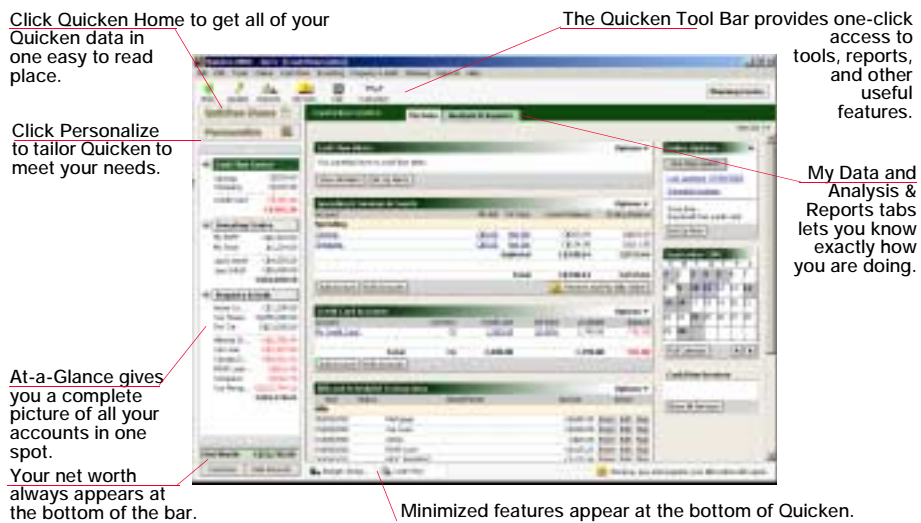
Quicken's Account Activity Centres have been redesigned so you can get your financial data quickly.

- **At-a-Glance**
Gives you a complete picture of all your accounts in one spot. It groups your accounts into key areas of your finances called Centres. Just click on the centre to see a summary and analysis of your financial data, or click on an account name to get to the account register.
- **Quicken Home**
Displays all of your Quicken data in one easy-to-read place. It is preset to display six powerful Quicken snapshots for tracking your personal financial data: your

Accounts, Alerts & Reminders, Scheduled Transactions, Securities Watch List, Download Summary, and Learn About Quicken.

You can customize your view of the Quicken Home page and delete, rearrange, or add new components up to a total of 40 different snapshots. Each view can track different areas, each containing only the Quicken data that is most relevant to you.

- My Data tab
Gives you an overview of what you have and what you need to do today.
- Analysis & Reports tab
Provides you with additional insights so you can see how you're doing and how you can do better.
- Minimize features
Any of your open reports or features are now minimized at the bottom of Quicken.
- Quicken Tool Bar
Provides one-click access to tools, reports, and other useful features. You can add or delete features from the Tool Bar by clicking on the Customize icon. Quicken will automatically transfer your old Tool Bar to Quicken XG.



Improved, More Flexible Pay Cheque Setup

Follow an easy one-time-setup, and in the future simply enter a single transaction. The other accounts associated with your pay cheque will be updated automatically. Choose Tax Menu ► Set up My Pay Cheque.

? Be sure to set up your pay cheque if you contribute to company sponsored RRSP plans, savings or stock purchase plans, or even have an employee loan.

Online Services

Use Quicken online services for better financial decisions with less data entry.

Enhanced Online Banking

- Bank Online with U.S. Banks
For those who frequent the United States regularly and have U.S. bank accounts, you can now download from some U.S. banks into Quicken. See "Set up Online Bank Accounts" on page 11 to get started.
- Improved One Step Update
One Step Update is a single access point for almost all online features. You can download transactions, make online payments, transfers funds, and send e-mails to your financial institution.
Note: Not all financial institutions work with Quicken's improved capabilities. To see if your bank has online access with Quicken and what banking services they offer, choose Online Menu ► Participating Financial Institutions.
- Receive and pay bills online
Quicken Bill Presentment and Payment by epostTM is a secure and free online service where you can receive, pay, and manage your bills electronically. It's accessible from any computer with Internet access, so you can get ahead of your bills when it's convenient for you.
To sign up choose Help Menu ► Show All Services ► Quicken Bill Presentment and Payment.

Informed Investing

- Download investing statements from more financial institutions
To see if your financial institution has online access with Quicken and what services they offer, choose Online Menu ► Participating Financial Institutions.
- Update stock & mutual fund prices, foreign exchange rates, and news headlines with a single click.
- Schedule automatic updates so your portfolio is always up-to-date
Scheduled updates lets you connect to the Internet to download current stock prices, and currency rates on a schedule that you specify. Quicken is update when you open it. See "Use Scheduled Updates" on page 20.
- Access Canadian investment content
Make better financial decisions with over 50 links to Canadian investment content.

Customer & Product Support

- Get online tips and FAQs from Quicken experts
- Receive online products and feature updates throughout the year
- Secure data with remote online backup
It's easy! Choose File Menu ► Backup and select Online.

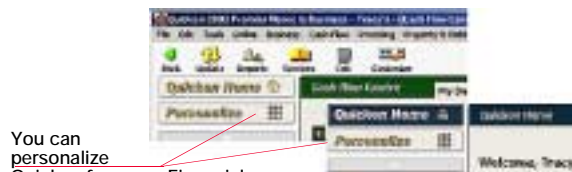
Business Services

- Accept major credit card payments
With Quicken Credit Card Service you can accept credit card payments by e-mail. Just send an online invoice and your customers pay using a secure web link included in their invoice. Click Pay by Credit Card on your invoice form.
 - Optimize you personal or small business insurance
 - Create a mini Business Plan
- To see all the Quicken services available, choose Help Menu ► Show All Services.

Customizable

Personalize Quicken

Get more out of Quicken with the new Personalize Quicken feature. Don't be bogged down by features that aren't relevant to your financial management strategy. Tailor Quicken to meet your individual needs by only showing the sections of Quicken that meet your current financial goals. As your needs grow, so does Quicken. Easily remove or add centres by clicking the checkbox in the Personalize Quicken window.



You can personalize Quicken from any Financial Activity centre. Just click the Personalize button in the upper-left hand corner.



Just click the check mark on the left to remove a centre from your view. To turn it on again just click the check mark again.

Starting a business? Turn on the Business Centre. Manage your accounts receivable and payables all from one place.

Do you use Quicken only to download transactions from your bank, and track your bills? Turn off the investing, taxes, and business features.

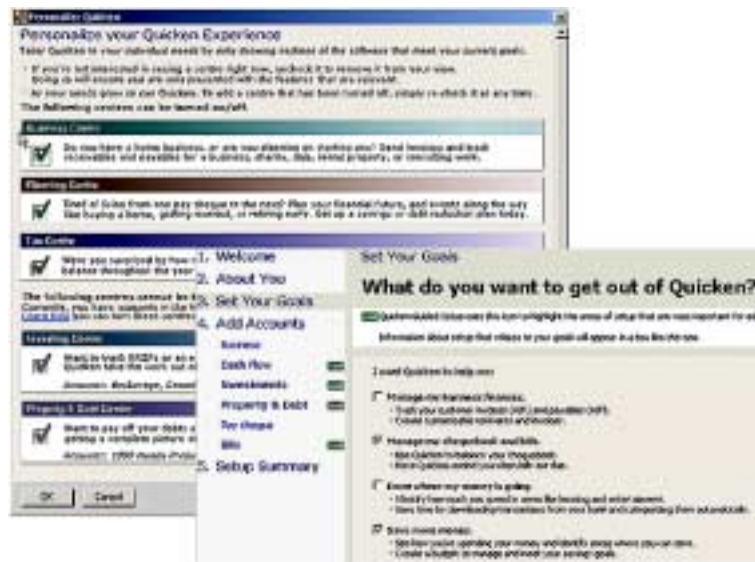
What Type of Quicken User Are You?

With Quicken's Guided Setup and Personalize feature, Quicken is truly as unique as you are. It can be as simple as just managing your basic banking and bills, or as comprehensive as managing your investment portfolio or home based business. The beauty of Quicken is that it is powerful and flexible enough to help anyone manage their finances better. Each user has different financial goals, sources of income, and money management priorities, but in order to achieve financial success they all need to answer three simple questions:

- What do I have?
- How am I doing?
- How can I do better?

Quicken can help you get the answers. The more financial information you provide to Quicken, the more Quicken can help you understand and improve your overall financial health. When you do, you're increasing the power of Quicken to incorporate all your financial data into a single, clear vision of where you stand and where you want to be.

Customize your Quicken to fit any one of the profiles below or build one that is unique to you.



5 Minute Quicken

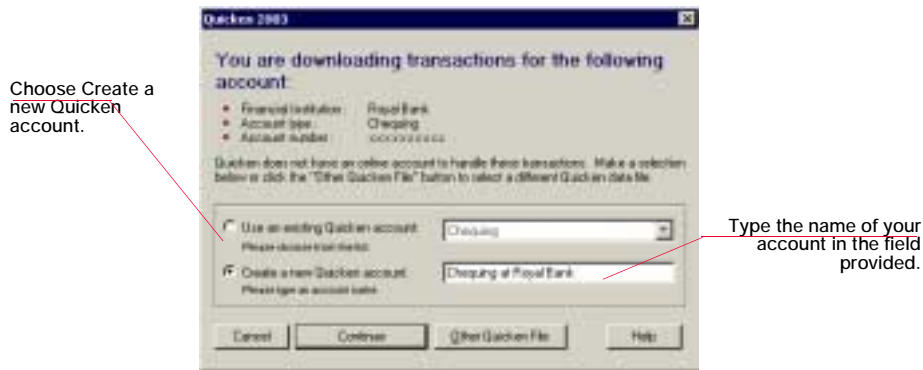
"I tend to live receipt to receipt; bill to bill. I have an online banking account but otherwise don't have a lot of time for my finances. I would like to get a bit more control of my debt and cash flow but not spend too much more time to get there."

Use the Quicken cash flow features to save time and effort with your banking and bill-paying chores. The QuickFill feature makes entering transactions in the register quick and simple. And if you assign categories to your transactions, Quicken can help you make a budget you can live with, run reports to find out where your money really goes, and run a host of powerful planning tools. Here are some of Quicken's key features designed to meet your financial management needs.

Set up Online Bank Accounts

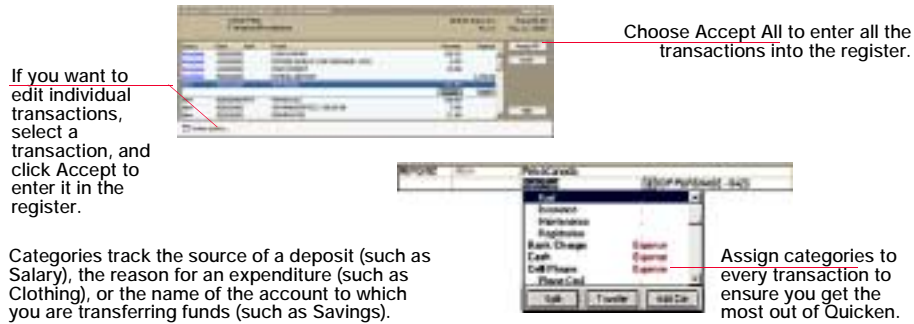
The easiest and most accurate way to set up your online banking accounts, is to just download your available transactions from your bank's Web site.

- 1 From your bank's Web site, select the download to Quicken option. (This option looks different for each bank.)
- 2 Choose Create a new Quicken account, and type the name of your account in the field provided, then select Continue.



2 For every download after, just open the register for the account you wish to download to and select Update Now. Quicken takes you to your bank—choose the download to Quicken option (just like you did above) and Quicken will download your transactions to your account register.

- 3 In the Online Update Summary window choose Go to Register so you can enter your transactions into your Quicken online banking account register.
- 4 Select a transaction, and choose Accept to enter it in the register. Choose yes when asked if you would like to select a category from the list. Choose a category from the list or add your own.



Categories track the source of a deposit (such as Salary), the reason for an expenditure (such as Clothing), or the name of the account to which you are transferring funds (such as Savings).

Categories are at the heart of Quicken—they are how you get a better understanding of where your money is going. Over time, you build a history of your spending habits. Once you assign a category for the first time, you shouldn't need to assign it again. Quicken memorizes the transaction and prefills the information for similar transactions such as rent, utilities, or groceries. Memorized transactions are a useful time-saving tool.

Balance your Chequebook (Reconciling an Online Account)

Quicken looks and works just like your chequebook. Once you've downloaded your transactions from your bank, take a minute to balance your chequebook, or as Quicken calls it, reconcile your accounts.

Reconciling on a regular basis ensures you always have the correct balance. You compare your Quicken account records against your current bank statement and resolve any differences between the two. Reconciliation covers both the transactions that occurred in the period covered by your current bank statement and the transactions that were processed previously.

- 1 Open the account register you want to reconcile, and click the Reconcile button.
- 2 In the Reconcile Online Account dialogue box, select Online Balance to reconcile your Quicken account to the latest downloaded data.
- 3 (Optional) Select Auto reconcile, after compare to register, to have Quicken automatically reconcile your transactions if they match transactions already in your register.
 With this option selected, after you download transactions, compare them to your register, and click Done, Quicken checks the status of the downloaded transactions. If there were no problems, Quicken marks all your downloaded transactions as reconciled. If your account doesn't reconcile, Quicken displays the Reconcile dialogue box to help you find the problem.
- 4 Click OK.
- 5 Quicken marks all the downloaded items that appear on your online statement.

Pay your Bills

With Quicken you can preschedule bills, set up reminders, print cheques and even receive your bills electronically.

Scheduling your bill payments with Quicken can save you time and help you remember to pay your bills when they are due. Schedule all your bills in the Financial Calendar, even if the amount varies. You can also schedule income and transfer transactions, such as pay cheque deposits or monthly transfers from chequing to savings.

Choose Cash Flow ► Scheduled Transaction List.

After you schedule a transaction, Quicken either reminds you about it or records it in your register when it is due. You can then make the payment online, print a cheque with Quicken, or write a cheque by hand.

Choose Tools ► Set Up Alerts.



Get out of Debt or Save More

Quicken uses your financial information to build a budget, a savings plan, or reduce your debt.

The Debt Reduction Planner leads you, step-by-step, through the process of entering information about your debts, and then it helps you set up a payment plan so that you'll:

- Pay the least amount of interest.
- Be out of debt at the earliest date possible.

Choose Planning Menu ► Debt Reduction Planner.

The Savings Goal Planner creates a special type of account, called a savings goal account. You transfer the necessary amount to this account each month, and the planner tracks it for you and lets you know how it's adding up. In addition, you don't need to open up yet another bank account; the money actually stays in your existing bank account, but it's hidden until you reach your goal and want to withdraw it.

Choose Planning Menu ► Savings Goals.

Quicken can create a budget for you based on your current spending patterns. Quicken uses the way you've categorized transactions to determine where in the budget they belong.

Choose Planning Menu ► Budget.



Quicken creates a budget for you based on your current spending patterns.

Debt Reduction Planner can help you set up a payment plan so that you'll be out of debt at the earliest possible date

To learn more about...	Search the Help index for...
Creating cash flow accounts that don't have online access	Setting up cash flow accounts
Creating credit card accounts	Setting up cash flow accounts
Create scheduled transactions (recurring payments)	Creating scheduled transactions
Problems reconciling	Reconciling an account
Working with U.S. banks	Downloading online account statements
Writing and printing cheques	Writing and printing cheques

Household Quicken

"I have a family and in addition to regular banking and bill management, I want to manage my household more effectively, and ensure that I am putting enough away for my children's education and my own retirement."

Tracking your banking and investing accounts can bring a great deal of order to your finances, but they don't show you the whole picture. Be sure to set up asset and liability accounts plus loans to track your net worth, or bottom line. You need to see the total value of what you own, minus the total value of what you owe, to understand the overall state of your financial health.

Use Quicken as your banking and household financial management tool. Build on 5 minute Quicken and track your assets and start planning for retirement or major purchases. Consider liabilities such as mortgages or car loans, as well as home, life or renter's insurance policies. There are also wills or living trusts. For example, using a House account lets you track the cost basis of your home, as well as the equity you're building. Use a linked mortgage account and loan to track your payment schedule and mortgage interest.

Create a House (Mortgage) Account

- 1 Click the Property & Debt Centre tab.
- 2 Click the My Data tab, if it is not already open.
- 3 Click Add Account.
- 4 Select House (with or without mortgage), and click Next.
- 5 Follow the onscreen instructions; click Next to move through the screens. Click Help if you need more information.
- 6 Click Done
If you choose, Quicken takes you to the Edit Loan window when you select done.

Create a Vehicle Account

- 1 Choose Property & Debt menu ► Property & Debt Centre.
- 2 Click the My Data tab, Click Add Account.
- 3 Select Vehicle (with or without a Loan) and click Next.
- 4 Follow the onscreen instructions; click Next to move through the screens. Click Help if you need more information.

If you told Quicken that you have a car loan, Quicken adds two accounts one for the positive value of the vehicle (a Vehicle account) and one for the negative value of the loan (a Liability account).

Plan for Major Purchases

Quicken's financial calculators provide tools that help you set financial goals for future spending; such as university education or a new vehicle.

- 1 Choose Planning menu ► Financial Calculators ► and select the calculator you wish to use.
- 2 Complete the fields shown and click Calculate to see the results.
- 3 To see the schedule you need to meet to achieve this goal click Schedule.
An example of the Retirement Calculator is shown below:

Enter your information in the appropriate fields.

Click Schedule to see the schedule you need to meet to achieve your goal.

Age	Deposit	Income	Balance
0	0.00	0.00	12,000.00
10	1,000.00	0.00	23,049.38
20	1,000.00	0.00	34,202.20
30	1,000.00	0.00	45,358.36
40	1,000.00	0.00	56,516.86
50	1,000.00	0.00	67,677.67
60	1,000.00	0.00	78,840.78
70	1,000.00	0.00	89,996.19
80	1,000.00	0.00	101,143.90
90	1,000.00	0.00	112,283.91
100	1,000.00	0.00	123,416.22

Manage your Mortgage

Whether you are buying a home or looking to arrange new financing for your existing home, don't pay more than you have to for your mortgage! Use QuickenMortgage to evaluate different mortgage options like rates and terms, see if you pre-qualify for a mortgage in just seconds, set up mortgage rate alerts or even apply online.

Choose Property & Debt menu ► Quicken Services ► QuickenMortgage.

To learn more about...

Search the Help index for...

Loans

Managing loans

Budgeting

Budgeting spending

Getting out of debt

Planning to get out of debt

Investor Quicken

"I have an investment portfolio that includes both securities and mutual funds. I want to see how they are performing at a glance, and track and analyze them to ensure they are performing up to my expectation."

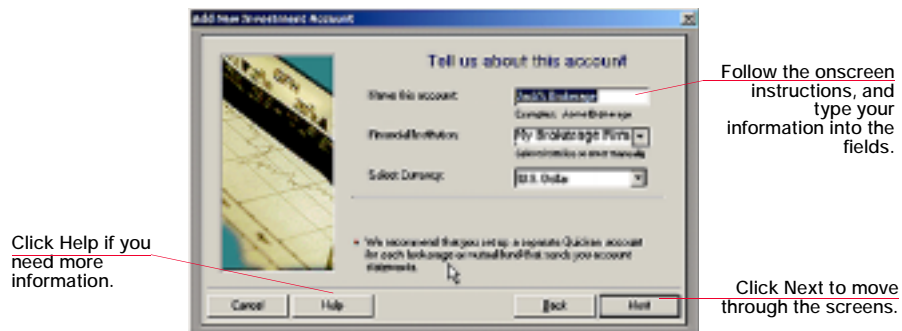
Quicken combines important data from all your investment accounts, no matter how many different financial institutions and plan administrators you have. Simply create a Quicken account for each of your real-world investment accounts, then use the powerful research and analysis tools to examine all your investments in one place. The Portfolio, Security Detail View, and investment reports give you news, fundamentals, performance, history, and analysis. Perhaps just as importantly, you can create a personalized asset-allocation target that includes all your accounts together, and then monitor and rebalance as necessary.

You can also evaluate your holdings, research potential investments, download stock quotes, historical prices, and asset classes, and also have Quicken alert you to important news about the securities in your Portfolio or Watch List.

Quicken records the purchase dates and prices when you enter or download transactions, so you don't need to search for old brokerage statements to calculate tax liability when you sell. Just tell Quicken how you want to handle the sale. The Capital Gains Estimator can help you optimize security sales to realize the greatest after-tax yield. And the capital gains report can save you hours at tax time.

Set up an Investment Account

- 1 Choose Investment menu ► Investing Centre.
- 2 Click the My Data tab, if it is not already open.
- 3 In the Investment & Retirement Accounts area, click Add Account.
- 4 Choose the Brokerage account type.
- 5 Click Next and follow the onscreen instructions in the windows that follow. Click Help if you need assistance. Click Done when you are finished.



Use Quicken to manage your investment portfolio with limited data entry. Quicken can automatically update your mutual fund data, security prices, and currency exchange rates overnight with Scheduled Updates. You can even download investment statements.

- 2** When entering historical investment data, pick a date you wish to track your data from and start from there. Enter the closest statement to your start date and work your way to the present.

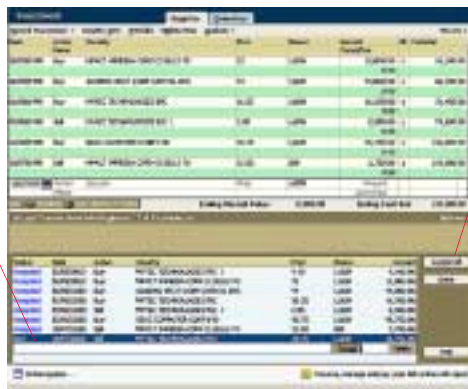
Download Investment Statements

- 1 First, make sure you have created a Quicken account for each of your brokerage accounts, and have entered ticker symbols for each of your holdings. To learn more, see "Prepare for your first investment transaction download" in the Onscreen Help. Choose Help menu > Contents > Search, and search for the phrase above.
- 2 To initiate your download, click Set Up Online located at the top of your register, or click the "Download transactions from..." link at the bottom of your register.
- 3 Select Download. (If you haven't signed up for online access choose Sign Up.)
- 4 Enter whatever password or PINs are required by your financial institution, find the download to Quicken option and click Send. (You may not be asked to enter a PIN until you click Send.)

When you connect to download transactions, you retrieve information for all online accounts at the selected financial institution. Typically, you can retrieve from three to nine months' worth of transactions for your first download. This number varies, depending on your financial institution.

- 5 When your connection is finished, review the Transmission Summary dialogue box, then click OK.
- 6 From the Account list in the Transactions tab, select each account to see its latest downloaded transactions. Double-click any single transaction to see more detailed information about it.

If you haven't applied categories to this type of transaction, then it's best to accept each one separately to ensure the correct category is chosen. Select a transaction and choose Accept to enter the transaction into the register.



Choose Accept All to enter all the transactions into the register.

Use Scheduled Updates

Scheduled updates lets you connect to the Internet to download current stock prices, and currency rates on a schedule that you specify. For example, if you normally use Quicken just after dinner, set up Scheduled Updates to bring your Quicken data file up-to-date at 5:00 p.m. each weekday.

Choose Online ► Scheduled Updates.

? It is important to remember that scheduled updates cannot take place while Quicken is running. If you are using Quicken when an update is scheduled to occur, Quicken displays a message when you exit the application telling you that you have missed a scheduled update.



To learn more about...

Securities
 RRSPs and RPPs
 Employee stock plans
 Reconciling investment accounts
 Capital gains
 Monitoring portfolio performance
 Scheduled updates

Search the Help index for...

Working with securities
 Entering updates to an RRSP/RPP account
 Tracking employee stock options
 Reconciling investment accounts
 Estimating capital gains before selling
 Monitoring portfolio performance
 Use scheduled updates

Business Quicken

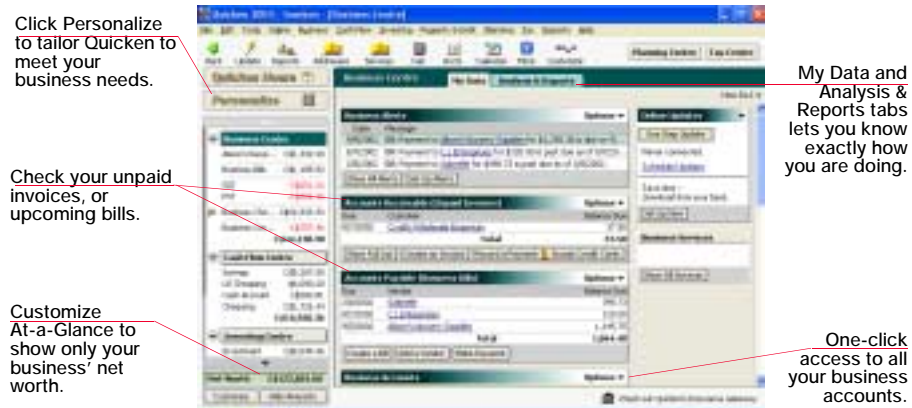
"I run a consulting business out of my home. I have no other employees. I want to be able to manage both my personal and my business finances from one software program."


Manage your business with the same ease as your personal finance but with all the business features you need. Similar to how you set up Quicken for your personal finances, you can manage all your business accounts including online banking accounts, savings, credit, and loans. You can track both your business and personal accounts in the same Quicken file.

After you set up banking and asset accounts for your business, come to the Business Centre to create Invoices and Receivables (A/R) and Bills and Payables (A/P) accounts.

Business Centre


Quicken's redesigned business centre lets you see the financial status of your business, check your unpaid invoices or upcoming bills, and more—all in one place. You can also create customer estimates, invoices, and statements, track accounts receivable, enter customer payments, and track accounts payable. You can also create several business reports such as balance sheets, profit and loss statements, unpaid invoices, accounts receivable reports, and accounts payable reports.



 It's best to keep separate accounts for business and personal transactions. For accurate reporting only assign business categories to your business transactions. If you have categories that you use for both your business and personal finances, such as rent, assign a class to each category. Classes let you use your personal chequing account for business and personal expenses. Leave your personal transactions unclassified, but assign the class name Business to your business transactions. For more information on using classes search the Help for "Working with classes."

Set up an Invoices/Receivables Account

- 1 Choose Tools menu ► Account List, then click New.
- 2 Select Invoices/Receivables as the account type, then click Next.
- 3 Type a name for the account.
- 4 Click Next and continue to enter account setup information.
- 5 Review the information on the summary screen, then click Done.

 You can create one invoices/receivables account to track the transactions for all your customers; for example, Business invoices. Or you can set up an account for each customer; for example, Smith & Brown invoices. If you have several businesses, you can set up one invoices/receivables account for each business.

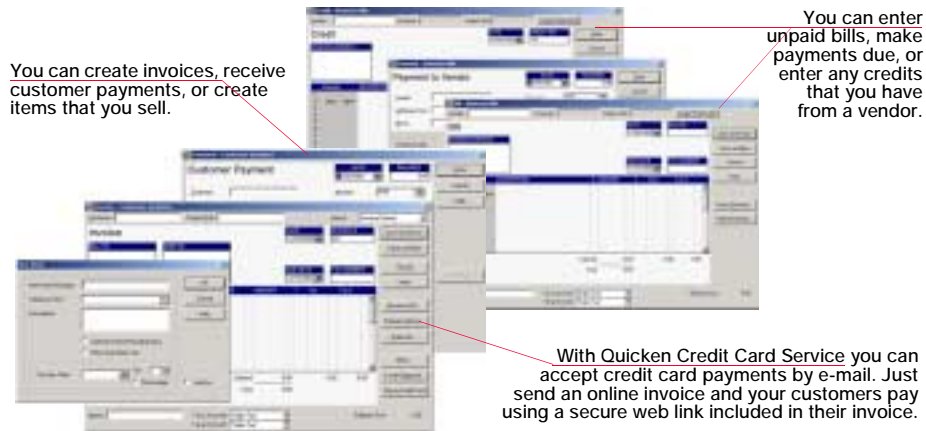
To get started, open your new Invoices/Receivables register from the Account List. You can create invoices, receive customer payments, or create items that you sell. Click Create New, choose a form, then enter the details.

Set up a Bills/Payables Account

Before you enter bills from your vendors, create a bills/payables (liability) account. The balance of your bills/payables account always equals the total of your outstanding bills.

- 1 Choose Tools menu ► Account List, then click New.
- 2 Choose Bills/Payables as the account type, then click Next.
- 3 Type a name for the account, then click Next.
- 4 Click Done.

To get started, open your new Bills/Payables register from the Account List. You can enter unpaid bills, make payments due, or enter any credits that you have from a vendor. Click Create New, choose a form, then enter the details.



Track Multiple Projects or Jobs

Projects and jobs are a convenient way to track related income and expenses. Although you don't need to assign a business form to a project/job, it's recommended that you do; if you have multiple projects underway with a single customer, you can track each project separately

Choose Business Menu ► Business Lists ► Project Job List.

Create Reports & Graphs

If you use Quicken for both personal and business finances, there are several reports that can help you keep track of your business. You can create a profit and loss statement, a balance sheet, a payroll report, A/R and A/P reports, and reports that track expenses and income by project. Such reports can help you chart the future course of your business

Follow the same basic steps to create all Quicken business reports:

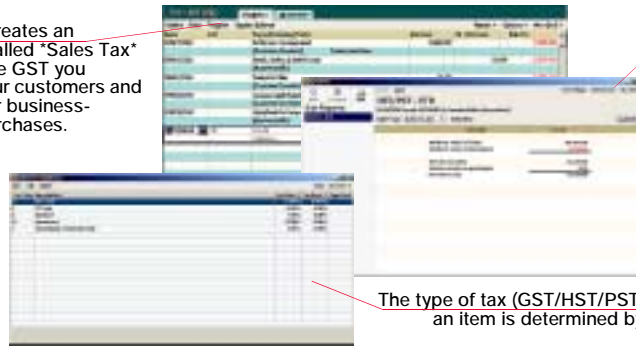
- 1 Go to the Reports and Graphs Centre.
- 2 Select "How is my business doing?" on the left.
- 3 Choose the report or graph that answers your question.
- 4 Click Create.

Manage your Business Taxes

Quicken creates a sales tax account when you create your first invoices/receivables account or bills/payables account to help keep track of the GST/HST or PST your company has collected on sales and the amount paid out on business-related purchases. Usually, you collect more GST or HST than you pay out and must remit the difference to the Canada Customs and Revenue Agency.

The first time you create an invoices/receivables account or bills/payables account, Quicken creates an account called *Sales Tax* to track the GST you charge your customers and pay out for business-related purchases. Sales tax accounts are liability accounts and they appear in your account list; you can view them by selecting them from the Account List.

Quicken creates an account called *Sales Tax* to track the GST you charge your customers and pay out for business-related purchases.



Use Quicken's new GST/PST report to help calculate how much GST you will need to remit to Canada Customs and Revenue Agency.

The type of tax (GST/HST/PST) that is charged on an item is determined by its sales tax code.

To learn more about...

Accounts receivable

Projects and jobs

Estimates and invoices

Payments and returns

Accounts payable

Sales tax (GST/HST/PST)

Search the Help index for...

Managing accounts receivable

Creating and tracking projects and jobs

Working with estimates and invoices

Managing payments and returns

Managing bills and accounts payable

Tracking sales tax
