

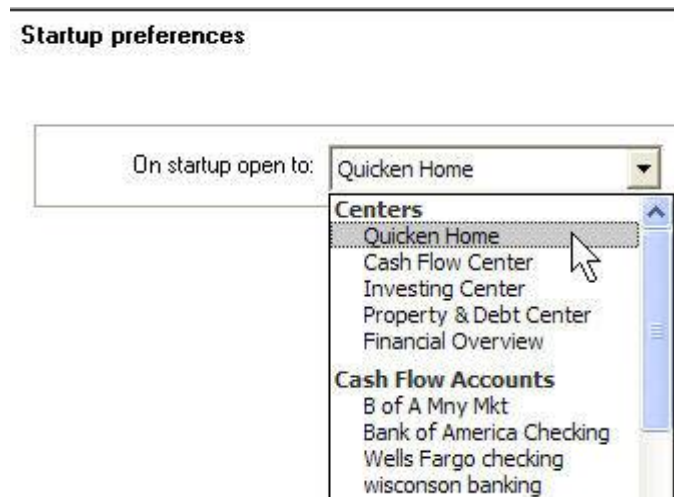
Quicken SIG Notes - May 24, 2005

Modifying the Quicken Interface

Sometimes I get so focused on getting my financial data into and out of Quicken that I forget to look at the interface. Quicken 2005 gives the user an amazing variety of "looks" for the interface between the data and the user. We will review some of the options on how you can make Quicken work better for your personal preferences.

Changing the Default Startup Screen

The default startup screen for Quicken 2005 is for the program to open looking at the Quicken Home page. I think I have done that for a couple of years. But an online post in the Quicken Forum, <http://www.quickenforum.com/>, showed that the Startup screen can be easily changed by going to the menu **Edit > Preferences > Quicken Program** and choosing **Startup** from the list on the left. That will allow you to use the dropdown menu that looks like the following.



Resetting the Startup Preferences

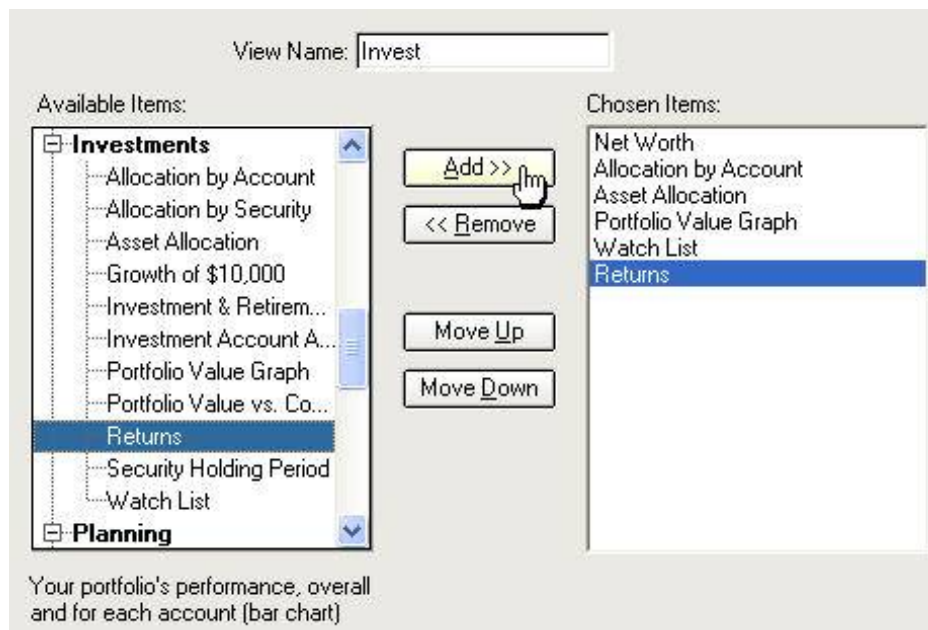
You can change the startup screen to have Quicken open showing your favorite checkbook register, for example. Or, if you are really into investing, you might want to have Quicken open showing the Investment Center. It is that easy to change.

Quicken will also allow you to modify a lot more of what you see when you interface with the program. For example, you can modify the appearance of any of the

Centers: Quicken Home, Cash Flow Center, Investing Center, Property & Debt Center, and Financial Overview.

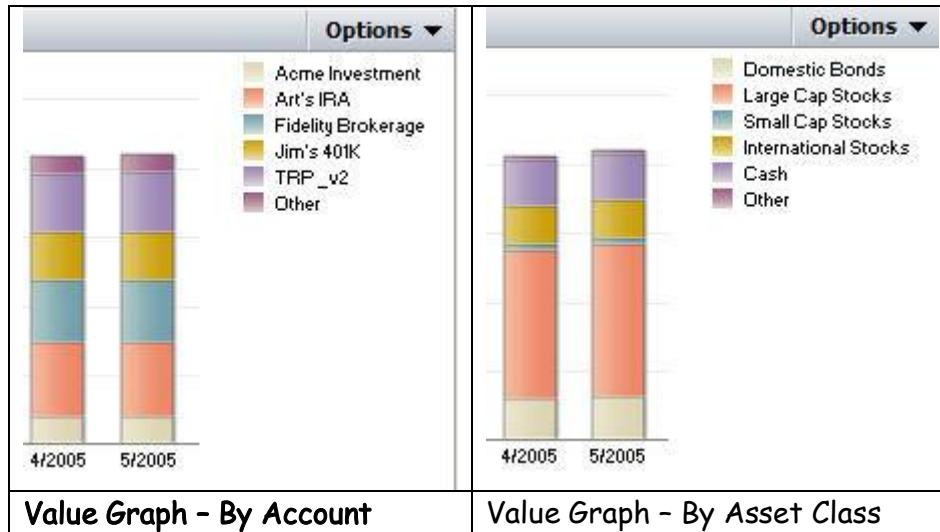
Changing the Quicken Home Screen

Let's look at how you can change the Quicken Home screen. First, select the **Quicken Home** icon. This is the normal default screen for Quicken 2005 on startup. You can add different screens by clicking on the **Create New View** phrase at the top right of the Quicken Home screen. Say you want to provide a quick summary of your investments. To do this, **Remove** the default suggestions from the list on the right and **Add items of interest** from the left list. Your list may look like this. I have titled the new view as "Invest".



Selecting New Items for an "Invest" View

This new view will be accessible in Quicken Home as a new tab at the top of the information display screen. Just click on the "Invest" tab. The items can be rearranged if desired by selecting **Customize > Customize this view**. You can, in turn, change the type of graphs and reports that you are displaying in any given tab. Say we have chosen "Portfolio Value Graph" to be displayed in our new "Invest" tab. To modify that graph, select the **Options** dropdown menu from the upper right of the graph display. Then select **View By** and select **Asset Class** instead of the default **Account**. The graph for Portfolio Value Graph will change.



In fact, every place you see the word **Options**, you can change the displayed data.

You can even change what you see on the Quicken Home screen. For example, the section for **Bills and Scheduled Transactions** normally shows in the **All - by Month** mode. Try changing the display to **All - by Bills and Deposits**. Which do you like?

Changing the Cash Flow, Investing, and Property & Debt Screens

All of the other screens can be changed using the **Options** dropdown menus within each screen. Generally speaking the format of the information can be changed, but the information category will remain the same, unlike in the Quicken Home screen where you can add and remove categories of information. Note also that almost each type of information contained within these *Center* screens is available to add to a new view of the Quicken Home screen. You could just create a new Tab with the data you want.

Financial Overview Screen

And finally, remember that Quicken has a **Financial Overview Screen**, containing three tabs: **Net Worth**, **Planning**, and **Tax**. And each of these tabbed screens can be modified, to some degree. Quicken is a powerful tool that can be modified to suit your individual preference in how you like to look at your financial data. Try it!

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