How do I update security prices (get quotes)?

When you download prices using One Step Update, Quicken:

- Provides the latest available prices (20 minute delay) and displays them in the Portfolio and Security Detail windows.
- Retrieves five days of prices for each update.
- Updates investment alerts online.

To put today's price in perspective, you can download up to five years' worth of historical prices for any security, then use the Security Detail View to see how today's price compares to prior performance (Internet access required).

Even if you use the online quotes feature in Quicken, there may be times when you want to edit the price history for a security by hand. For example, you might need to do this to match with the ending date of a broker's statement, or if you've been manually tracking an employee stock purchase plan (ESPP) account prior to Quicken 2002.).

You can retrieve security prices (get quotes) from the Internet for securities and market indexes that you track in Quicken, provided that you've the correct ti cker symbol assigned to the security.

To manually download current security prices

1. Click the **Investing** tab.
2. Choose **Update** > **Quotes**.
3. Alternatively, if you use **One Step Update**, you can download quotes as part of the update process.
4. To include or exclude a security from the update (Optional):
    - Choose **Tools** menu > **One Step Update**.
    - Enter your password and then immediately click Settings.
    - In the One Step Update Settings window, click the (select quotes) link.
    - In the Security List, select or clear the Download Quotes check box for the security, as necessary.

Notes

- Quicken will not download prices for securities that don't have the correct ticker symbols assigned to them.
- Quicken does not update prices for money market securities (or any security whose ticker symbol ends with XX), so don't select money market securities for updating when setting up your online quotes.
- Unlike stock prices, mutual fund and exchange traded option prices are set once a day and updated each evening after the market closes. Until then, mutual fund and exchange traded options are quoted at the closing price for the previous day.
- Quicken will download prices for multiple securities with the same ticker symbol, even if you've selected only one security for update. If you want to update only one security, edit the other securities to remove their ticker symbols.

To automatically download current security prices

This feature is available in Quicken Premier, Home & Business, and Rental Property only.

1. Choose **Edit** menu > **Preferences**.
2. In the left pane, click Investment transactions.
3. In the right pane, select Automatically update quotes every 15 minutes.
4. To include or exclude a security from the update (Optional):
    - Choose **Tools** menu > **One Step Update**.
    - Enter your password and then immediately click Settings.
    - In the **One Step Update Settings** window, click the (select quotes) link.
    - In the Security List, select or clear the **Download Quotes** check box for the security, as necessary.

Notes

- As long as you remain connected to the Internet, Quicken will update your security prices every 15 minutes.
- Quicken will not download prices for securities that don't have the correct ticker symbols assigned to them.
- Quicken does not update prices for money market securities (or any security whose ticker symbol ends with XX), so don't select money market securities for updating when setting up your online quotes.
- Unlike stock prices, mutual fund prices are set once a day and updated each evening after the market closes. Until then, mutual fund prices are quoted at the closing price for the previous day.
- Quicken will download prices for multiple securities with the same ticker symbol, even if you've selected only one security for update. If you want to update only one security, edit the other securities to remove their ticker symbols.

To download historical security prices

1. Click the **Investing** tab.
2. Click the **Update** button and choose **Historical Prices**.
3. Select the securities that you want historical data for.
4. Select the time span you want data for from the drop-down list. You can download data for the past month, the past year, the past two years, or the past five years.
5. Click **Update Now**.

Notes

- Internet access required; Quicken will not download prices for securities that don't have the correct ticker symbols assigned to them.
- Quicken downloads daily prices of the selected securities for the most recent month, weekly prices for the 11 months prior to that, and monthly prices thereafter.
- Selected securities have a green check mark beside them. Click individual securities to select or clear them.

To determine when security prices were last downloaded

1. Click the **Investing** tab.
2. Click the **Portfolio** button. Information about when security prices were last updated is displayed at the bottom of the window. If a security price has not been updated during the day, a clock icon appears in the **Quote/Price** column for the security. Hover your cursor over the icon to see when it was last updated.

To manually edit a security's price history

1. Click the **Investing** tab.
2. Click the **Tools** button, and choose **Security List**.
3. Click the name of the security you want to edit.
4. Click **Update**.
5. Choose **Edit Price History**.
6. You can add, delete, and edit prices from here.
7. To add a new price, choose **New** and enter the date and price. The figures for High, Low, and Volume are optional.
8. To change a price for a specific date, select the price and click **Edit**. Enter the new price. The figures for High, Low, and Volume are optional.
9. To delete a price, select it and click **Delete**.
10. To print the price history list, click **Print**.

Notes

- The price history of a security comes from a variety of sources: investment transactions you enter that include a security price, prices you enter in the Portfolio window, prices you enter directly in the **Price History** window, prices you download from the Internet, and prices you import.
- The **Price History** window lists the most recent price of the selected security and all previous prices recorded for it by date. When you add, change, or delete a price, the new information is added to the Portfolio and Security Detail View windows. No changes are made to transactions already entered in the transaction list.
- To delete several prices at once, hold down the **SHIFT** or **CTRL** key while selecting the prices you want to delete, and then click **Delete**.

To update prices manually in the Portfolio

1. Click the **Investing** tab.
2. If necessary, click the Portfolio button at the top of the page.
3. To record a price for a date other than today, click the pop-up calendar beside the **Portfolio As Of fi**eld, and select a date.
4. Select the security you whose price you want to update. To do so, click anywhere on the security line, but not on the security name.
5. Enter the new price in the **Quote/Price** column. If the **Quote/Price** column doesn't appear in the **Portfolio**, click the **Customize View** button to add it.

Notes

- You can also enter high, low, and volume information if you've customized the **Portfolio** window to show those columns.
- Quicken records up to a total of 11 digits.
- Press + or - to increase or decrease the price to the next 1/16 (or 0.0625).

To update prices manually from my account statement

When you reconcile an investment account with your account statement, Quicken gives you the option of updating prices from the statement.

1. Open the investment account you want to reconcile.
2. Click the **Investing** tab.
3. Click (the **Account Actions** icon), and then choose **Reconcile**.
4. Enter the starting cash balance and ending cash balance from your statement.
5. Click **OK**.
6. Click in the **Clr** column next to each transaction that appears on your statement.
7. When the difference between your statement ending balance and your cleared balance in Quicken is zero, click Done**.**
8. Change the **As of: date** in the **Portfolio** window to the date shown on your statement.
9. For each security, type the statement price in the **Price** column.