Getting started

The steps to get started depend on whether you are new to Quicken or whether you are converting from another version of Quicken.

If you are new to Quicken or want to start with a new data file

If you are using Quicken for the first time or want to start fresh with a new data file, perform these steps:

1. In Quicken, choose **File > New** to create a new Quicken data file.
2. Select **Start from scratch** and click **Next**.
3. Set your mobile and web sync preference including a nickname for your cloud account (you can change this at any time).
    - This app is available for free for iPhone, iPad, and Android phones and tablets. Learn more about Quicken Mobile, Web and alerts.
4. After these steps, the Add Account dialog will automatically appear so you can add your financial accounts to Quicken.

Next steps: If you are new to Quicken

- Add your financial institutions to Quicken
- Browse the Help topics listed in Quicken basics

If you are converting from a different version of Quicken

Quicken can convert your existing data from Quicken for Mac 2007, Quicken Essentials and Quicken for Windows. Just choose the version you are coming from when prompted during first use.
You can also import data from these other versions into an existing Quicken data file via the **File > Import** menu.

If you are upgrading from Quicken Essentials, perform these steps:

1. Before starting, review the pre-conversion task.
2. In Quicken, choose **File > New** to create a new Quicken data file.
3. Select **Start from a Quicken Essentials file**.
4. Select your existing **Quicken Essentials** data file file when prompted. (This file must have the extension **.quickendata**.)
5. Set your mobile and web sync preference including a nickname for your cloud account (you can change this at any time).
    - This app is available for free for iPhone, iPad, and Android phones and tablets. Learn more about Quicken Mobile, Web and alerts.
6. After these steps, your Quicken Essentials data will be converted and you will see the **Overview** view. All of your accounts will be listed in the sidebar.

Take a look at the post-conversion tasks.

1. Before starting, review the pre-conversion task.
2. In Quicken, choose **File > New** to create a new Quicken data file.
3. Select **Start from a Quicken for Mac 2007 file**.
4. Set your mobile and web sync preference including a nickname for your cloud account (you can change this at any time).
    - This app is available for free for iPhone, iPad, and Android phones and tablets. Learn more about Quicken Mobile, Web and alerts.
5. Select the Quicken for Mac 2007 file you'd like to convert. (This file must have the extension **.QDFM**.)
    - If you have a large data file, this could take some time. Please do not quit Quicken until the file conversion is complete.
6. After these steps, your Quicken 2007 data will be converted and you should see the **Overview** view. All of your accounts will be listed in the sidebar.

Take a look at the post-conversion tasks.

1. Before starting, review the pre-conversion task.
2. In Quicken, choose **File > New** to create a new Quicken data file.
3. Select **Start from a Quicken for Windows file**.
4. Set your mobile and web sync preference (you can change this at any time).
    - This app is available for free for iPhone, iPad, and Android phones and tablets. Learn more about Quicken Mobile, Web and alerts.
5. Select your existing **Quicken Windows (.QDF**) file when prompted.
    - If you have a large data file, this could take some time. Please do not quit Quicken until the file conversion is complete.
6. After these steps, your Quicken Windows data file will be converted and you will see the **Overview** view. All of your accounts will be listed in the sidebar.
    - See what data gets carried over.
    - Take a look at the post-conversion tasks.

Disclaimer

Quicken has no control over the data that is exported from other personal finance applications. As such, our import is only as good as the exported data provided in a .QIF file.
We want to make the transition to Quicken easy and have put a great deal of effort into handling issues related to missing or incorrect data that is imported from other personal finance applications.
However, we have found gaps or missing data in these exported QIF files, especially with investment transactions. As a result, some data cleanup after import may be required after your data is imported into Quicken (see the known Banktivity and Moneydance issues below).
Please read these Help topics carefully to ensure a smooth transition to Quicken:

- Banktivity import issues and data clean up
- Moneydance import issues and data clean up

Note: Personal finance applications other than Banktivity and Moneydance have not been tested for import in Quicken.
Quicken supports data import from other personal finance applications such as Banktivity and Moneydance. For this, you need to **first export data from the other applications into a .QIF file** and then import the .QIF file into Quicken.

Export data from Banktivity to a .QIF file

1. Open your Banktivity application. Select **File >Export > QIF file**.
2. Make sure that you select **all the accounts you wish to import** in Quicken. Incremental import of QIF files into Quicken is not supported.
3. Save the newly created QIF file and exit Banktivity.

Export data from Moneydance to a .QIF file

1. Open your Moneydance application. Select **File >Export**.
2. On the **Export Date** window, select Format: **QIF** and date: **All Dates**
3. Save the newly created QIF file and exit Moneydance.

Import an exported .QIF file into Quicken

1. Open the Quicken application.
2. In Quicken, choose **File > New** to start a new data file. The **Let's get started window** is displayed.
3. Select the option **Start from a .QIF file exported from another application**.
4. You'll be asked if you want to use Quicken Mobile or Web. Make your selection and continue.
5. Click **Next**. The **Import data from another application** window is displayed.
6. Follow the on-screen instructions to import the .QIF file in Quicken.

After conversion please read these Help topics:

- Banktivity import issues and data clean up
- Moneydance import issues and data clean up

Next Steps: If you are converting from another version of Quicken

- See what data gets carried over
- Reconnect your accounts for automatic download
- After you have converted your data
- If your overall balance looks wrong