Quicken Mobile App FAQ

About the Quicken Mobile App

The Quicken Mobile App is a **companion** to our Win/Mac application. It is not designed to be your only Quicken application. The best use of the **Quicken Mobile App** is to check information and make updates while you are away from your computer.

When using the Quicken for Win/Mac and the **Quicken Mobile App** together, the key is synchronization. Always sync Quicken before and after each session. **Information cannot be shared between the apps unless you sync. Be sure to perform an update before and after every session on your computer. To update your Quicken Mobile App, swipe down on the main screen.**

What can I do in Quicken for Mobile?

You can view account transactions as well as account totals, spending, budgets, bill & income reminders, and investments.

You can add new transactions, as well as designate categories, tags, notes or other information for those transactions.

What can't I do in the mobile app (but can do on the desktop app)

You can't add or delete accounts, categories, tags, budgets, renaming rules, or memorized payees. You also can't generate reports.

How can I tell which data file Quicken Mobile App is accessing?

Select the menu at the top left corner of the Quicken Mobile app. You will see your email, followed by the name of the data file (dataset) you are using.

I synced my account but I'm having one of the following issues…

- I'm getting a message that says, **No synced financial accounts.**
- I don't see my accounts in the cloud / on mobile / on the web.
- My accounts are not updating
- The accounts I see don't match my desktop

If you are having one of the above issues, check to see if you are accessing the same data file (dataset) as your desktop application. Often, people have more than one data file, and you may be accessing the wrong one. To switch data files in the Quicken Mobile App:

1. Select on the top left corner of your screen. Your current data file appear under your **User ID**.
2. Select . A list of your data files will appear.
3. Select the data file you want to use. The new data file will launch in your app.

If you don't know the data file (dataset) name for your desktop file, see **Why can't I find my latest data file?**

Why doesn't the Quicken Mobile app have all of my accounts? Why can't I see the account I added in my Win/Mac version of Quicken?

If you have recently added an account in the Quicken Win/Mac application, it is probably a synchronization issue. Make sure you have updated your transactions on both the mobile and desktop versions of Quicken. If the account still does not appear, follow the steps below:

Windows

1. In your desktop application, go to the **Mobile & Web** tab.
2. Verify that **Sync** is turned on OFF ON.
3. Verify that your account is listed in the panel **Accounts enabled on mobile and web**.
4. If your account is not listed, select the **Settings** button, then **Account Settings**.
5. Select the checkbox by any accounts you want to sync with the Quicken Mobile App.
6. If it is not already selected, select **Sync to Quicken Cloud**.
7. Select **Sync Now**.
8. Perform an update .
9. Go to the **Quicken Mobile App** and sync (swipe down). Your account will appear.

Mac

1. In your desktop application, go to go to **Quicken** > **Preferences** > **Mobile, Web & Alerts**.
2. Select **Accounts**.
3. Verify that your account is listed and the checkbox for your account is selected.

4. Verify that **Sync** is turned on.
5. Select **Update**.
6. Perform an update.
7. Go to the Quicken Mobile App and sync. Your account will appear.

Why am I missing Transactions?

If you are missing transactions you were expecting to see on the Quicken Mobile App, there may be a few causes.

Mismatched data files
After signing into the **Quicken Mobile App**, you are given a list of data files associated with your Quicken ID. Be sure that the file you selected matches the file you are using in your Win/Mac application.

Synchronization issues
When using the Quicken desktop app and the **Quicken Mobile App** together, the key is synchronization. Always sync Quicken before and after each session. Information cannot be shared between the apps unless you sync. Be sure to perform an update before and after every session on your computer. To update your **Quicken Mobile App**, swipe down on the main screen.

Older Transactions
The **Quicken Mobile App** will sync back to May 1st, 2017. Transactions before that date will not appear in the app.

Are the transactions you are expecting to see still pending with your bank?
Like the Quicken desktop software, the **Quicken Mobile App** will only display transactions that have posted with the bank. Transactions showing as "pending" on the bank's end will not display in the **Quicken Mobile App**.

Why are my balances off/different from the desktop application?

The **Quicken Mobile App** has three different ways of calculating your balance:

- **Today's Balance:** The balance of all transactions entered as of as of the last refresh / update.
- **Online Balance:** The balance of your account according to your financial institution. This could be different from your current balance if, for example, you manually recorded a check in Quicken but it has not yet cleared your financial institution.
- **Projected Balance:** The projected balance is the balance of all transactions entered in the account register, including future-dated transactions such as postdated checks and online payments that have been sent but not yet processed

These balances can vary compared to your desktop balance. To see these balances, swipe your finger across balance screen.

How do I sync my bank account?

To sync your accounts, you need to update your Win/Mac account before updating the **Quicken Mobile App**. If you still cannot see your account:

Windows

1. In your desktop application, go to the **Mobile & Web** tab.
2. Verify that your account is listed in the panel **Accounts enabled on mobile and web**.
3. If your account is not listed, select the **Settings** button, then **Account Settings**.
4. Select the checkbox by any accounts you want to sync with Mobile.
5. Select **Sync Now**.
6. Go to the **Quicken Mobile App** and sync. Your account will appear.

Mac

1. In your desktop application, go to **Quicken** > **Preferences** > **Mobile, Web & Alerts**.
2. Select **Accounts**.
3. Verify that your account is listed and the checkbox for your account is selected.
4. Select **Update**.
5. Go to the **Quicken Mobile App** and update. Your account will appear.

Why can't I find my latest data file (dataset)?

If you have created a new data file (dataset), and you have both saved your file to your Win/Mac machine and performed an update, you may need to set up your new data file (dataset) to sync.

3. Start your desktop application with the data file (dataset) you want to use.
4. Verify which data file (dataset) you are using. It should be the data file (dataset) you expect to see on the **Quicken Mobile App**.

   - Windows: **Edit** > **Preferences** > **Quicken ID & Cloud Accounts** > **Dataset Name**.
   - Mac: **Quicken** > **Preferences** > **Connected Services** > **Cloud Account**.

5. Ensure that **Sync** is set to **On** :

   - Windows: **Edit > Preferences** > **Mobile & Web**.
   - Mac: **Quicken > Preferences** > **Mobile, Web & Alerts**.

6. Update your transactions from your desktop program .
7. Log in to the **Quicken Mobile App**.
8. Verify that the data file now appears.

How do I remove a data file (dataset) so I don't see it in the Mobile App?

If you have multiple datasets, they can be accessed from the Quicken Mobile App. This can be confusing and counterproductive if you only want to work one or two datasets. To remove extra datasets from the cloud, follow the instructions below.
Note: This does not delete the dataset from your Windows or Mac computer.

Windows

1. Go to **Edit** > **Preferences** > **Quicken ID & Cloud Accounts**.
2. Select **Cloud accounts associated with this Quicken ID**.
3. Select any dataset you don't want associated with your cloud account.
4. Select **Delete**.
5. Continue to remove datasets until you only see the ones you want associated with your cloud account.

Mac

1. Go to **Quicken** > **Preferences** > **Connected Services**.
2. Select **See All Cloud Accounts.**
3. Select any dataset you don’t want associated with your cloud account.
4. Select the button.
5. Continue to remove datasets until you only see the ones you want associated with your cloud account.

How do I include my investment accounts in the Mobile app?

Your investment accounts are not listed with your other accounts at the top of the Quicken Mobile app screen, however, you can see them next the bottom of your screen listed under Investing. If you cannot find and Investing section, then it is possible that your Investing accounts were not included in your sync. For more information see **Why doesn’t the Mobile app have all of my accounts?**