

APPENDIX C: INSTALLING QUICKEN

- ▶ Installing Quicken
- ▶ Upgrading Quicken
- ▶ Registering Quicken

Quicken installations fall into two camps—fresh installations, and upgrades from a previous version. Either way, a Quicken installation doesn't offer many options. About all you get to choose is where to install the software, but you don't have to do even that. But beware: this simplicity may lull you into cavalierly choosing options that you'll later regret. The installation procedures in this appendix explain which options you should choose and why.

Installing Quicken

Installing Quicken is mostly about common sense. The steps in detail are as follows:

- 1. As with most installations, it's a good idea to shut down any programs you have running, including your virus protection program. Then insert the Quicken CD into your CD drive.**

Most of the time, the installation procedure starts on its own, and the Quicken 2006 installation window appears. Although the Install Quicken button is your target at the moment, take note of the other buttons for later exploration.

For example, Related Software takes you to a screen with information about other Intuit programs, like Pocket Quicken for tracking finances on a hand-held device. Troubleshooting provides a hyperlink to the Intuit support Web site (www.intuit.com/support/quicken).



Tip: If the Quicken 2006 installation window doesn't appear, use Windows Explorer to view what's on the CD drive. Look for the icon for the installation program, *install.exe*. (It looks like a miniscule compact disc, and it won't be inside any other folders or icons.) To begin the Quicken upgrade, double-click *install.exe*. Then, in the Quicken 2006 installation wizard, click Next to get started.

2. In the Quicken 2006 window, click Install Quicken.

Your CD drive begins whirring and a window appears reassuring you that the InstallShield Wizard for Quicken 2006 is ready to assist you. When you see the heading “Welcome to the installation for Quicken 2006,” you’re ready to rock ‘n’ roll.

3. Click Next to display the Quicken 2006 Software License Agreement screen.

Quicken’s license agreement mainly protects Intuit in case the software doesn’t perform as you expect. For example, Intuit doesn’t claim that the software is free of bugs and viruses, nor does it guarantee that using the program ensures correct tax returns.

4. After you read the software agreement, choose the “I accept the terms in the license agreement” option and click Yes.

The Destination Folder screen appears. The wizard automatically chooses *C:\Program Files\Quicken*, which is fine for most people. If you want to install to a different folder, click Change and choose the folder you want.



Note: If you install Quicken to a different folder, you may have to uninstall the program manually when you try to upgrade to the next version. See the box on page 407 if you have any trouble.

5. Click Next.

The “Ready to Install the Program” screen appears.

6. To begin the installation, click Install.

In addition to the audible signs of progress from your CD drive and hard drive, the wizard displays the installation task it’s performing and a progress bar showing how far it’s gotten. In a few minutes (depending on your computer’s age and health status), you see the Check for Quicken Updates screen.

7. To make sure your software is completely up to date, click Get Update.

The Quicken program that comes on the CD you buy isn't necessarily the latest and greatest version. Each new Quicken release is always followed by a few updates with bug fixes and additional enhancements. Updating Quicken also assures you and your financial institutions the latest information for online services.

Make sure you're online, because the Quicken One Step Update, shown in Figure C-1, connects to the Internet, grabs any updates, and applies them to your program. If you don't have time for updates or don't have an Internet connection at the moment, click Next to skip this step.

8. In the Quicken Update window, click Use Quicken Now if you're ready to get to work. If you'd rather run Quicken later, click Done.

The installation and update are complete. If you click Use Quicken Now, the Get Started with Quicken wizard cheerfully welcomes you to start choosing options to prepare your data file for use.

But before you get too deep into Quicken, consider cleaning up the passel of shortcuts that the installation dropped on your desktop. These shortcuts are marketing offers for credit cards, savings accounts, credit reports, and a free month of Quicken BillPay. If you're interested in any of these offers, leave them for the time being. (Just remember to delete them later so they don't contribute to the erosion of your screen real estate.)

Quicken also adds a desktop shortcut for Quicken itself. If you prefer to launch programs from the desktop, leave this shortcut as is. A less-cluttered approach is to delete this shortcut and launch your programs from the Start menu or the Quick Launch toolbar.

Upgrading Quicken

Upgrading Quicken is even easier than installing the program in the first place. Here are the steps:

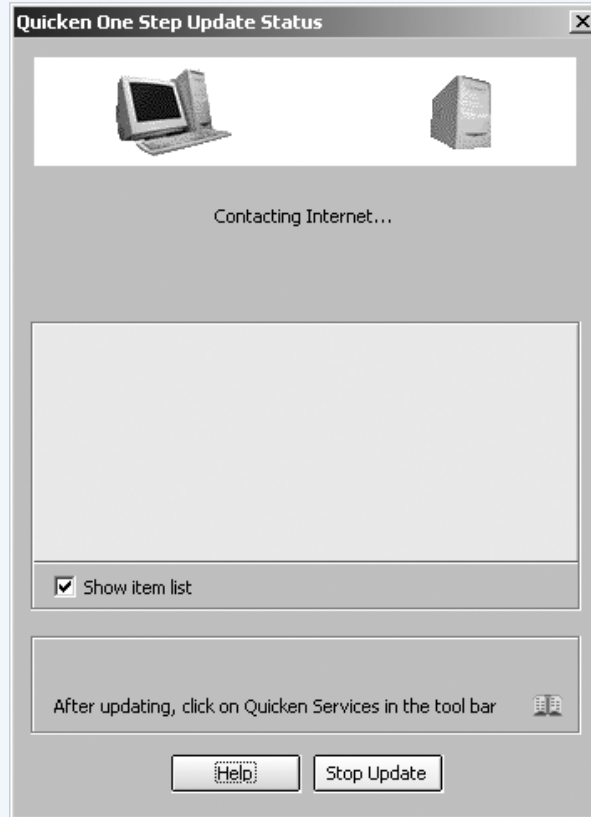


Figure C-1. The One Step Update automatically connects to the Internet, downloads any available updates, and applies them to your copy of Quicken.

- 1. Back up your data file to your hard disk or external media, as described in Chapter 3.**

Although Quicken makes a backup copy during the upgrade, creating your own backup is extra insurance in case something goes wrong.

- 2. Shut down any programs you have running, including your virus protection program, and then insert the Quicken CD into your CD drive.**

Most of the time, the installation procedure starts on its own, and the Quicken 2006 installation window appears. (If it doesn't, launch the CD's *install.exe* program, as described in the Tip on page 400.)

3. In the Quicken 2006 window, click Install Quicken.

More CD and hard drive whirring ensue. When you see the heading “Welcome to the InstallShield Wizard for Quicken 2006,” you’re ready to upgrade.

4. Click Next.

The License Agreement screen appears.

5. Choose the “I accept the terms in the license agreement” option, and then click Next.

The Destination Folder screen appears. The wizard automatically chooses *C:\Program Files\Quicken*, which is fine for most people. If you want to install to a different folder, click Change and choose the folder you want.

6. Click Next.

Here’s your first indication that you’re upgrading. The Ready to Install the Program screen appears, telling you that it’s about to uninstall your previous version of Quicken and install Quicken 2006, as shown in Figure C-2.

7. Click Install.

The wizard indicates which task it’s working on and displays progress bars. The upgrade doesn’t take long, so don’t plan on grabbing coffee. When the installation is complete, the Check for Quicken Updates screen appears.

8. Click Get Update.

Obtaining the most recent updates is always a good idea—you want the latest version of the software and financial institution information. Make sure you’re online, because the Quicken One Step Update connects to the Internet, grabs any updates, and installs them.

If you don’t have time for updates or you don’t have an Internet connection at the moment, click Next to skip this step.

Installing Two Versions of Quicken

Suppose you want to test a new version of Quicken before you entrust your financial data to it. Running two versions of Quicken takes a bit of planning, because the Quicken 2006 upgrade uninstalls the previous version. Moreover, to keep your data up to date until you make up your mind, you have to enter all of your transactions into both versions.

Here are the steps to convince Quicken 2006 and your previous version to run on the same computer with a minimum of sibling rivalry.

1. Save a copy of your Quicken data file using a name that indicates the Quicken version, like MyMoneyQn2005.qdf.
2. Begin installing as you would normally.
3. In the Installation Welcome Screen, press Ctrl+Shift and simultaneously click the Next button. A message box advises you that the installer *won't* uninstall your current version of Quicken.
4. Choose the "I accept the terms in the license agreement" option, and then click Yes.
5. Change the name of the installation folder to a folder for the *new* version (for example, Quicken2006Test).

6. At this point, the installation wizard steps you through the installation just like a new install.

Running multiple Quicken versions can affect how the program operates, so it's a good idea to put the new version through its paces to see if you want to continue using it. If you don't like the new version, uninstall it. Then launch the previous version and open the data file *copy* you made based on the previous version. In this example, you would open the MyMoneyQn2005.qdf file you created in step 1.

To try the new version, launch it, open your *current* Quicken data file, and follow the instructions for converting the data file to the new version. If you don't want to convert your data file, you can download a sample data file at Intuit's Press Room (http://quicken.intuit.com/about_intuit/press_room/index.jhtml). In the Virtual Press Kit drop-down menu, choose "Quicken 2006 for Windows." The press kit includes a sample data file and other information about the new version.

If you decide to use the new version, uninstall the previous version.

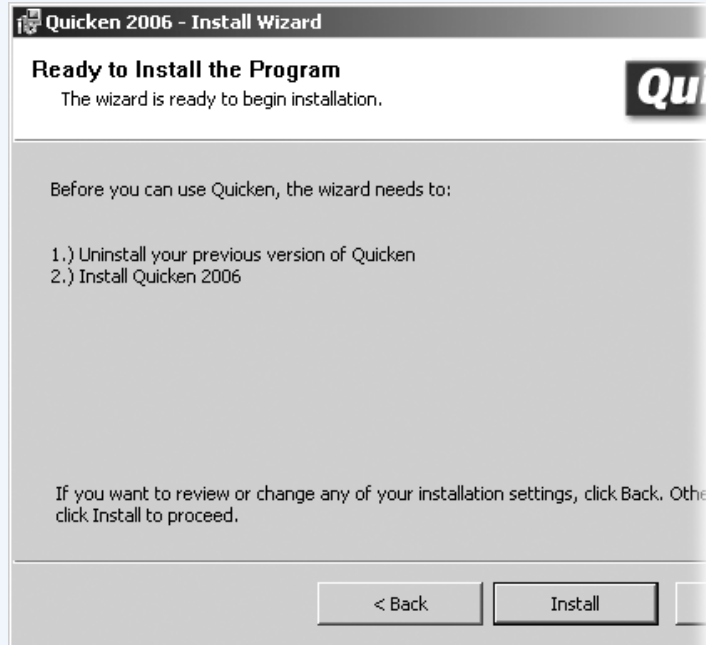


Figure C-2. When you click Install, the wizard first removes the program files for your previous version of Quicken (your data files remain intact) and then installs Quicken 2006.

9. In the Quicken Update window, click Use Quicken Now if you're ready to get to work.

If you'd rather run Quicken later, click Done.

If you click Use Quicken Now, Quicken 2006 launches and immediately opens the Convert Your Data dialog box, shown in Figure C-3.



Tip: When the program converts your data file, it saves a pre-conversion copy of your files in a subfolder called Q05 (if you're upgrading from Quicken 2005) in the same folder. For example, if you store your data file in *My Documents\Quicken*, the program creates the folder *My Documents\Quicken\Q05*. If you want to revert to using Quicken 2005, you can replace the converted files with these Quicken-2005-format files.

TROUBLESHOOTING MOMENT

When Quicken Doesn't Uninstall Properly

If you install Quicken in a folder other than the one that the program suggests, you have to uninstall your previous version manually. To uninstall a program on a PC, choose Start → Settings → Control Panel → Add or Remove Programs. Select your Quicken program in the window that opens, and then click Remove.

If you receive an error message or have problems either uninstalling or

installing, you must run a tool to remove the program's files from your computer.

Search Intuit's knowledge base (Choose Help → Quicken Help) for "Msifix.exe." The knowledge base article ID is 575514 and includes links to download *MSiFix.exe*, which removes Quicken from your computer, and *QFix.exe*, which completes your installation.

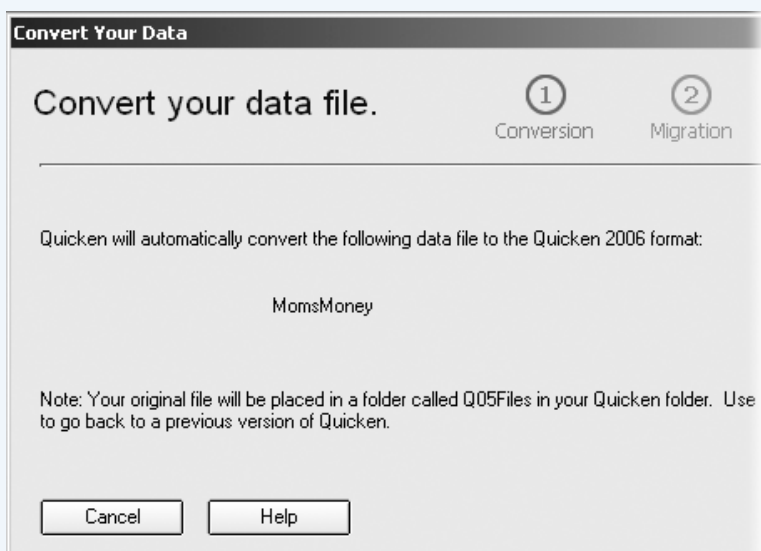


Figure C-3. The Convert Your Data dialog box displays the data file that it'll convert (in this case MomsMoney). You can convert other data files later by opening them with Quicken 2006.

10. Click OK.

The program tells you how many items it's converted and then opens the converted data file.

When conversion is complete, the Get Started with Quicken 2006 window opens, ready to walk you through what's new in the 2006 version. Click Next for an introduction to the new features, which continues through several screens. To start working immediately, click Cancel.



Tip: To find out about new features at a more convenient time, choose Help → “What's new in Quicken.”

Registering Quicken

At some point after you install or upgrade, the Product Registration window appears. You can click Register Later to postpone the inevitable, but register you must. Quicken registration has two components, which the window in Figure C-4 describes: registering your software so you can receive program updates and free stock quotes, and registering with Quicken.com to take advantage of its online features or store information online.



Tip: If registration has trouble connecting to the Internet, the problem may lie with Quicken's Internet Connection settings. See page 220 to learn more about helping your Internet connection and Quicken communicate.

The registration window displays instructions for both parts of registration. Simply provide some basic information about yourself—like name, address, and email. Note that the checkbox to subscribe to the Quicken monthly personal finance newsletter is automatically turned on. If you're trying to cut down on junk mail, turn it *off* before you click Register. If you're in an informative mood, you can also fill in some other text boxes and checkboxes that tell Intuit how you plan to use the software. Click Register when you're done.



Figure C-4. You must have an Internet connection to register, so be sure to connect before you click Register Now.

You'll see a screen for the second step of registration—setting up your Quicken.com member ID and password. You don't have to register for Quicken.com, especially if you don't plan to keep any data on the Web site. In the program's icon bar, you can navigate to the registration site by clicking "Quicken.com." If you already have a member ID for Quicken.com, go ahead and sign in. Otherwise, you can fill in the text boxes to create a Quicken.com member account. Click Finished to complete your registration.

