

Quicken 2006

You must read this
before installing
your software!

Before you install

- **Can I install Quicken 2006 and keep my existing Quicken 2005 version installed on my PC?**

Quicken 2006 cannot be installed if you have a Quicken 2005 version installed on your PC. You will need to uninstall Quicken 2005 before installing Quicken 2006.

Earlier Quicken versions, Quicken 2004, Quicken 2003, Quicken 2002, Quicken V8 and below will not affect your Quicken 2006 installation if you install in a new directory.

- **Can I convert my CashBook or Home & Business data file to Quicken 2006?**

CashBook or Home & Business data files cannot be converted by Quicken 2006. If you attempt to do so, you will risk losing your data.

- **Installing Quicken 2006**

Ensure you complete STEP 1 and STEP 2 before installing Quicken 2006.

Ensure you are logged on to your PC as the Administrator and have the appropriate access rights to install.

If you have anti-virus software installed on your PC, it is recommended that you disconnect your internet connection and then disable your anti-virus software as it may interfere with software installation.

If you experience installation problems, refer to 'Installing on windows' at the end of this document.

STEP 1 – Check the upgrade path for your current version of Quicken

Find your current version from the list below and check the upgrade path. If there is a tick in the row for your current version, then you can upgrade directly to Quicken 2006 (see STEP 3 – C).

If 'via Personal Plus 2004' appears in the row for your current version, then you must firstly upgrade your data file to Personal Plus 2004 and then to Quicken 2006. You must do this before installing Quicken 2006. See **STEP 3 – Upgrade your data file** for full instructions.

If your current version does not appear in the list below, you cannot upgrade your data to Quicken 2006.

YOUR CURRENT VERSION	Quicken Personal Plus 2006	Quicken Personal 2006
Personal Plus 2005	✓	
Personal 2005	✓	✓
Personal Plus 2004	✓	
Personal 2004	✓	
Personal Plus SE 2002	✓	
Personal SE 2002	✓	✓
Personal Plus 2002	✓	
Personal 2002	✓	✓
Personal Plus v8	via Personal Plus 2004*	
Personal v8	via Personal Plus 2004*	

*Personal Plus 2004 is provided on your Quicken 2006 CD. Click the **Upgrade Software** button from the Quicken 2006 Starter Kit which appears when you insert the installation CD in your CD drive.

Upgrade Software	Located on CD
Personal Plus 2004	\ CV \ PPTrial \ Disk1 \ setup.exe

STEP 2 – Prepare your data file for upgrade

1) Back up your data file

To do this, choose **File menu > Backup**. Choose the file you wish to back up and the location you wish to back it up to. For more information on how to back up, please refer to the User Guide (available on the Quicken CD) or Online Help for “Backing up your data”.

2) Validate your data file

Ensure the data file you are using is validated before upgrading your software. Validating a data file allows Quicken to verify its integrity. Choose **File menu > File Operations** and click **Validate**. Find and select the data file you wish to validate and click **OK**. You will need to repeat this process for every data file you wish to upgrade.

3) Print a selection of Reports from the data file in your currently installed version

You can use these Reports after upgrading to confirm the data which appears in the upgraded version is correct.

4) Take note of your Quicken Settings / Preferences

Some of the settings within your data file will revert to the default settings of Quicken 2006. Make a note of your personal settings and preferences so you can apply these to your upgraded data file.

5) If you have a linked investment account

If you upgrade a Quicken data file that contains a linked investment account, the Investment Activity Report in Quicken 2006 will always report on all transactions from both accounts. To avoid this from happening, you should un-link the accounts in your previous version prior to upgrading.

STEP 3 – Upgrade your data file

A – Upgrading from Quicken Personal v8 or Personal Plus v8

You will need to upgrade your data file to Personal Plus 2004 before installing and upgrading to Quicken 2006. Personal Plus 2004 is available on the Quicken 2006 CD.

Follow the steps below to upgrade your data file to Personal Plus 2004.

1. Make sure that your current version of Quicken (Personal v8 or Personal Plus v8) is backed up on disk and your hard drive then close Quicken.
2. Insert your Quicken 2006 CD into your CD-ROM drive. The installation screen will automatically appear. If this does not happen, select **Run** from the Windows Start menu, then type d:\autorun.exe (where d is your CD-ROM drive) and click **OK**.
3. From the menu, select **Upgrade Software**.
4. Click on **Install Personal Plus 2004 Trial**.
5. Click **Yes** when prompted to install Personal Plus 2004.
6. Click **Next** when the Welcome screen appears.
7. Choose where you would like to install Personal Plus 2004 and click **Next**.
Note: You should install Personal Plus 2004 in the same installation directory as your previous version (default location is c:\program files\quickenw).
8. A message will be displayed prompting you to uninstall your previous version of Quicken. Click **Yes** to uninstall your previous version of Quicken. This will not affect your existing Quicken data.
9. Follow the prompts to uninstall your previous version of Quicken.
10. Click **No to All** when prompted to remove all shared files.
11. When the uninstall process is complete, click **OK**.
12. Select **Run** from the Windows Start menu, then type d:\autorun.exe (where d is your CD-ROM drive) and click **OK**.
13. From the installation screen menu, select **Upgrade Software**, then click on **Install Personal Plus 2004 Trial**.
14. Follow the prompts to install Personal Plus 2004.
Note: You should install Personal Plus 2004 in the same installation directory as your previous version (default location is c:\program files\quickenw).
15. Restart your computer to complete the installation of Personal Plus 2004.
16. Launch Personal Plus 2004 and upgrade your data file by clicking **OK** when prompted. If you have more than one data file, each must be upgraded by selecting **Open** from the File menu and selecting the data file.
17. Once you have completed upgrading your data file/s to Personal Plus 2004, follow the instructions under **B – Upgrading from Quicken Personal 2002, Personal Plus 2002 (or 2002 SE), Personal 2004 or Personal Plus 2004**.

STEP 3 – Upgrade your data file

B – Upgrading from Quicken Personal 2002, Personal Plus 2002 (or 2002 SE), Personal 2004, Personal Plus 2004

You may directly upgrade your data file to Quicken 2006.

Please Note: When you upgrade to Quicken 2006, a backup of your original file will automatically be placed in a folder in your Quicken directory. See **Other issues to be aware of** for instructions.

Follow the instructions below to upgrade your data file to Quicken 2006

1. Ensure you have completed the instructions in **Step 2 – Prepare your data file for upgrade**.
2. Make sure your current version of Quicken is closed.
3. Insert the Quicken 2006 CD into the CD-ROM drive. The installation screen will automatically appear. If this does not happen, select **Run** from the Windows Start menu. Type 'd:\autorun.exe' (where d is your CD-ROM drive) and click **OK**.
4. From the installation screen, select **Install Quicken 2006**.
5. Click on **Install Quicken Now** to install the full version.
6. Click **Next** when the Welcome screen appears.
7. Read the Licence Agreement and if you agree to the terms, click **Yes**.
8. Select the type of installation and the Country version, then click **Install Now**.
Note: If you have an older Quicken installation (v2004 or below) on your PC, you may receive a message requesting that you exit and uninstall before installing Quicken 2006. When you return to install Quicken 2006, you may be asked to **Remove Shared Files?** Select **Yes to all**.
Note: If you selected a **Custom** install, click **Next** to choose the install location for Quicken 2006. Follow the prompts to install Quicken 2006.
9. Select **Yes** to restart your computer, and click **Finish**
10. The first time you open Quicken 2006, you will be required to Activate by entering your Quicken Installation Key. This process will take place automatically over the Internet. If you do not have an Internet connection, you will need to click **Cancel** on the messages that appear and then call Customer Support to complete the process over the telephone.
11. The first time you open your data file in Quicken 2006, the upgrade process will begin. Read the upgrade message and click **OK** if you wish to continue. If you have a large file or if you have investment data, the upgrade may take several minutes.
12. Follow the prompts to set up your data file in Quicken 2006, click **Done** when you have finished.

STEP 3 – Upgrade your data file

C – Upgrading from Personal 2005 or Personal Plus 2005

You may directly upgrade your data file to Quicken 2006.

Please Note: When you upgrade to Quicken 2006, a backup of your original file will automatically be placed in a folder in your Quicken directory. See **Other issues to be aware of** for instructions.

Follow the instructions below to upgrade your data file to Quicken 2006.

1. Ensure you have completed the instructions in **Step 2 – Prepare your data file for upgrade**.
2. Make sure your current version of Quicken is closed.
3. Insert the Quicken 2006 CD into the CD-ROM drive. The installation screen will automatically appear. If this does not happen, select **Run** from the Windows Start menu. Type 'd:\autorun.exe' (where d is your CD-ROM drive) and click **OK**.
4. From the installation screen, select **Install Quicken 2006**.
5. Click on **Install Quicken Now** to install the full version.
6. Click **Next** when the Welcome screen appears.
7. Read the Licence Agreement and if you agree to the terms, click **Yes**.
8. You will receive a message asking if you want to uninstall your existing version. If you do not want to uninstall Quicken 2005, click **No**.

Note: You must click **Cancel** in the following Quicken Installer screen to exit Quicken 2006 installation. If you click **Install Now**, you will receive the following message; "Setup has detected an earlier version. To upgrade your data from this version you must follow the instructions in the upgrade notes on your CD. Do you want to continue", clicking **Yes** will uninstall Quicken 2005.

You may receive another message; "Do you want to completely remove the selected application and all of its features?", click **OK** if you wish to continue installing Quicken 2006.

9. Select **No**, I will restart my computer later, and click **Finish**.
10. You may now continue the Quicken 2006 installation. Select the type of installation and the Country version, then click **Install Now**.
Note: If you selected a **Custom** install, click **Next** to choose the install location for Quicken 2006. Follow the prompts to install Quicken 2006.
11. Select **Yes** to restart your computer, and click **Finish**.
12. The first time you open Quicken 2006, you will be required to Activate by entering your Quicken Installation Key. This process will take place automatically over the Internet. If you do not have an Internet connection, you will need to click **Cancel** on the messages that appear and then call Customer Support to complete the process over the telephone.
13. The first time you open your data file in Quicken 2006, the upgrade process will begin. Read the upgrade message and click **OK** if your wish to continue. If you have a large file or if you have investment data, the upgrade may take several minutes.
14. Follow the prompts to set up your data file in Quicken 2006, click **Done** when you have finished.

STEP 4 – After you have upgraded your data file

- Check your data in the upgraded version. Run the same reports you ran before upgrading and compare them to confirm the data matches. If your data does not match the previous version, try to identify where the problem is. For example, it may relate specifically to categories or transactions.
- Check the Quicken settings and preferences against the settings you noted before upgrading your data file in STEP 2.
- Explore Quicken's many new features in **What's new in Quicken** under the Help menu.

Other issues to be aware of

Changes to Cash Flow Forecasts

After upgrading, Quicken may not be able to recognise cash flow scenarios that you have saved in a previous version. If this occurs, you will need to re-create the forecast following the upgrade. To do this, select Cash Flow Forecast from the Planning dropdown menu, then select accounts and dates from the Options menu to customise the scenario. Select Manage Scenarios from the Options menu. Click New and enter a new scenario name, then click OK to save the new scenario.

Updating your stocks from Quicken Version 8 or below

Quicken includes new features for tracking your investments, such as the ability to download stock prices from different exchanges (Australia, NZ, US). If you have upgraded from Version 8, the exchange and asset class for each security will be set to your default country. You must specify the asset class and exchange for each security once you have upgraded to Quicken 2006. To do this, select Security List from the Investment dropdown menu. Highlight the individual security and then select Edit from the menu. You will then be able to assign an exchange and asset class from the relevant dropdown lists. If a 'Symbol Change Affects Price History' message appears, simply click OK to copy the quotes.

Changes to Budgeting

Many features of Quicken have been updated in response to feedback from Quicken users. The budgeting feature and user interface has been customised to make it easier to use. As a result, you may notice budgets no longer use a spreadsheet format or show projected balances in Quicken 2006.

Category groups

If you created your own groups for categories in a previous version, they may not be maintained during the upgrade to Quicken 2006. In order to recreate these groups and reassign them, select Category List from the Tools menu, then select the relevant category from the list and click Edit. Select the group dropdown menu and click New. Enter a new group name and click OK. Continue to create new group names as necessary and assign them to relevant categories.

Billminder is no longer available in Quicken

If you have upgraded from Quicken 2004 or below, you will notice that we have removed Billminder from Quicken. This is in response to customer feedback, which advises us that Billminder is not a valued feature.

If you upgraded a data file that contained a linked account

The Quicken 2006 Investment Activity Report will report on all transactions from the linked accounts. New transactions entered in the linked accounts in Quicken 2006 will continue to appear in the Investment Activity Report.

Other issues to be aware of

Opening your original data file after upgrading from Quicken 2005

When you upgrade to Quicken 2006, a backup of your original data file will automatically be placed in a folder called **Q05Files** in your Quicken directory. Use this backup to view your original file in your previous version. You may use the File>Restore or File>Open function.

Opening your original data file after upgrading from Quicken 2002 or Quicken 2004

When you upgrade to Quicken 2006, a backup of your original data file will automatically be placed in a folder called **UpgBkup** in your Quicken directory. Use this backup to view your original file in your previous version. You may use the File>Restore or File>Open function.

Installing on Windows

Access permissions

If you encounter the error message "**Installshield Error 1608**: Unable to create InstallDriver instance, unable to install", you will need to change the DCOM file on your computer.

To do this;

- a) Click the Microsoft® Windows® Start button, choose Run.
- b) Enter dcomcnfg in the Open field, and then click OK.

Note: If you are running Windows 98 and the dcomcnfg file is not on your computer, install DCOM98 from <http://www.microsoft.com>, and then continue with the steps below. (At the Microsoft Web site, type dcomcnfg in the Search for field, and then click Go to find and download this file.) The version of DCOM listed on the Microsoft Web site for Windows 98 may also be installed on Windows ME computers.

- c) Click the Default Security tab, and then in the Default Access Permissions section, click Edit Default.
- d) Make sure that Allow Access is selected, and then click OK. Try installing again. (If you receive the error message again, continue to step f.)
- e) If the issue continues to occur, install Quicken in Safe Mode, and then restart your computer. (If you receive the error message again, continue to step g.)
- f) If the issue still persists, create a new Windows user account with administrator permissions.

Note: These steps apply to Microsoft® Windows® 2000 and may vary for other Windows versions. Please refer to Windows Help for specific instructions for your version.

- g) Click Start button > Settings > Control Panel. Then double-click Users and Passwords.
- h) Click the User tab, click Add User, and then follow the onscreen instructions to create a user account with administrative permissions.
- i) Restart your computer and login with the new administrator account.
- j) Attempt to install or uninstall the Quicken program again.

Other installation problems

- Are you logged onto your PC as the Administrator?
- Have you shut down all applications?
- Is your anti-virus software blocking your installation of Quicken?
- Try installing Quicken in safe mode. For instructions on re-starting your PC in safe mode, refer to your windows help. Once you have installed Quicken in safe mode, do not try to open it. Re-start your PC in normal mode and make sure you are connected to the internet. Open Quicken and enter your install key to Activate. If you do not have an internet connection, you will need to click **Cancel** on the messages that appear and then call Customer Support to Activate over the telephone.
- Still having problems? Check the Quicken on-line knowledge browser at <http://www.quicken.com.au/Support/FAQs.aspx> and search the database for error message.