

Quicken Simplifi

Quicken Simplifi Personal Finance Software

Model: Simplifi | Brand: Quicken

INTRODUCTION

Welcome to Quicken Simplifi, your personal finance software designed to help you manage your money effectively. This manual provides essential instructions for new subscribers to set up, operate, and maintain your Simplifi account. Quicken Simplifi offers a comprehensive suite of tools to track spending, create budgets, set savings goals, and monitor investments, all from a single platform accessible via web and mobile.

SETUP INSTRUCTIONS

Follow these steps to activate your Quicken Simplifi subscription and begin managing your finances:

1. **Account Activation:** As a new subscriber, you will receive an online code. Visit the official Quicken Simplifi website and follow the prompts to redeem your code and create your account.
2. **Link Financial Accounts:** Once logged in, navigate to the 'Accounts' section. Use the secure connection feature to link all your bank accounts, credit cards, loans, and investment accounts. Simplifi's connectivity ensures a complete financial overview.
3. **Initial Data Sync:** Allow time for Simplifi to securely download and categorize your transaction history from linked accounts. This process may take a few minutes depending on the number of transactions.
4. **Review Categories:** After the initial sync, review the automatically assigned categories for your transactions. You can customize or re-categorize transactions as needed to ensure accuracy.



Quicken®

Simplifi | Cloud-based app

Everything you need to budget, save, & invest

- ✓ Always know what's left to spend or save
- ✓ Custom savings goals & retirement planner
- ✓ Insights & helpful reports for better financial decisions
- ✓ Advanced investing analysis tools

**New
Subscribers
Only**

1-year subscription | Includes automatic connection to latest, up-to-date version.

Image: Main interface of Quicken Simplifi, highlighting key features for budgeting, saving, and investing.

OPERATING INSTRUCTIONS

Utilize the following features to manage your personal finances effectively:

1. Spending and Budgeting

- **Spending Plan:** Simplifi automatically generates a spending plan based on your income, bills, and subscriptions. This helps you visualize how much money is available after essential expenses.
- **Track Spending:** Monitor your categorized spending in real-time. The software provides insights into where your money is going, allowing for informed adjustments.

Grow your savings and your investments

Net worth ↑ \$124,014

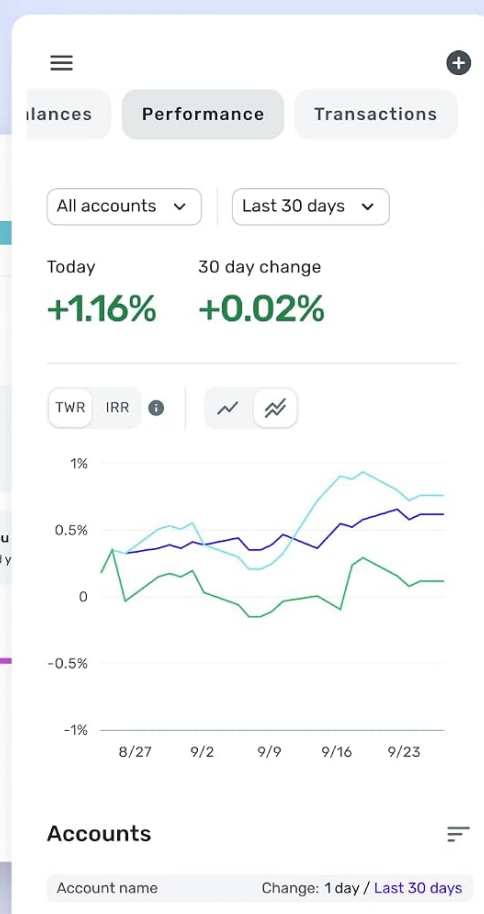
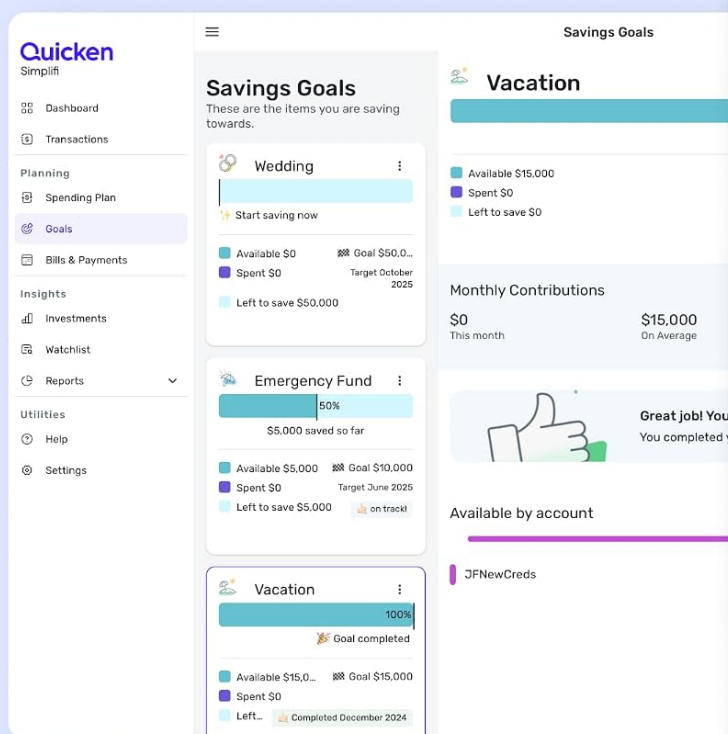


Image: A detailed view of the 'Total Spending' section, showing expenses broken down by categories like Shopping, Groceries, Dining & Drinks, Fitness, and Subscriptions.

2. Savings Goals and Retirement Planning

- **Create Goals:** Set custom savings goals (e.g., for a vacation, down payment, or emergency fund). Simplifi helps you track progress and commit funds towards these goals.
- **Retirement Roadmap:** Access tools to create projections for your retirement based on current savings, expenses, and future goals. Adjust your plan to stay on track.

Which Quicken is right for you?

	Simplifi Best for budgeting, savings & investments	Classic Deluxe Best for traditional personal finance	Classic Premier Best for experienced investors	Business & Personal Best for experienced investors, retail & business income
Platform	Cloud - Web & Mobile	Desktop - Windows & Mac	Desktop - Windows & Mac	Desktop - Windows & Mac
See all your accounts in one place	✓	✓	✓	✓
Automatically download & categorize transactions	✓	✓	✓	✓
Create and track your saving goals	✓	✓	✓	✓
Auto-generated spending plan	✓			
Traditional, category-based budgets		✓	✓	✓
Investment performance tracking & market quotes	✓	✓	✓	✓
Retirement planning	✓	✓	✓	✓
Capital gains estimator		✓		✓
Assess impact of buy/sells & Morningstar Portfolio X-ray			✓	✓
Tax reports	Schedules A & B	Schedules A, B & D	Schedules A, B & D	Schedules A, B, C, D & E
Manage your personal & business finances				✓
Customer support	Free phone & chat	Free phone & chat	Premium phone & chat	Premium phone & chat

Image: The 'Savings Goals' and 'Performance' sections of Simplifi, displaying progress towards goals like 'Wedding' and 'Emergency Fund', alongside investment performance charts.

3. Investment Management

- **Portfolio Overview:** View your entire investment portfolio in one place.
- **Analysis Tools:** Utilize tools for cost basis tracking, performance analysis, and real-time quotes to make informed investment decisions.

4. Reporting and Insights

- **Pre-built Reports:** Access categorized breakdowns of spending, saving, and income.
- **Custom Filters:** Customize reports to meet your specific analytical needs, providing deeper insights into your financial health.

MAINTENANCE

Regular maintenance ensures the accuracy and effectiveness of your Simplifi software:

- **Regular Syncing:** Ensure your accounts are regularly synced to reflect the most current transactions and balances.
- **Categorization Review:** Periodically review and adjust transaction categories to maintain accurate financial reporting.
- **Goal Updates:** Update your savings and retirement goals as your financial situation or objectives change.
- **Software Updates:** Simplifi is a cloud-based app, which includes automatic connection to the latest, up-to-date version. Ensure your web browser or mobile app is updated for optimal performance.

TROUBLESHOOTING

If you encounter issues, consider the following common troubleshooting steps:

Issue	Solution
Accounts not syncing or showing outdated data.	Manually initiate a sync from the 'Accounts' section. Verify your login credentials for the financial institution are correct. Check the financial institution's website for any service outages.
Transactions are incorrectly categorized.	Edit the transaction and manually assign the correct category. You can also create rules to automatically categorize similar future transactions.
Unable to log in.	Ensure you are using the correct username and password. Use the 'Forgot Password' option if necessary. Clear your browser's cache and cookies, or try a different browser.
Performance issues or slow loading.	Check your internet connection. Ensure your web browser or mobile app is up to date. Close other demanding applications.

SPECIFICATIONS

- **Product Type:** Personal Finance Software (Online Code)
- **Subscription:** 1 Year Subscription (for NEW Simplifi Subscribers)
- **Platform:** Cloud-based (Web Browser & Mobile App)
- **Manufacturer:** Quicken, Inc.
- **ASIN:** B0DPGNRD1P
- **First Available:** December 8, 2024

Better insights for better financial decisions.

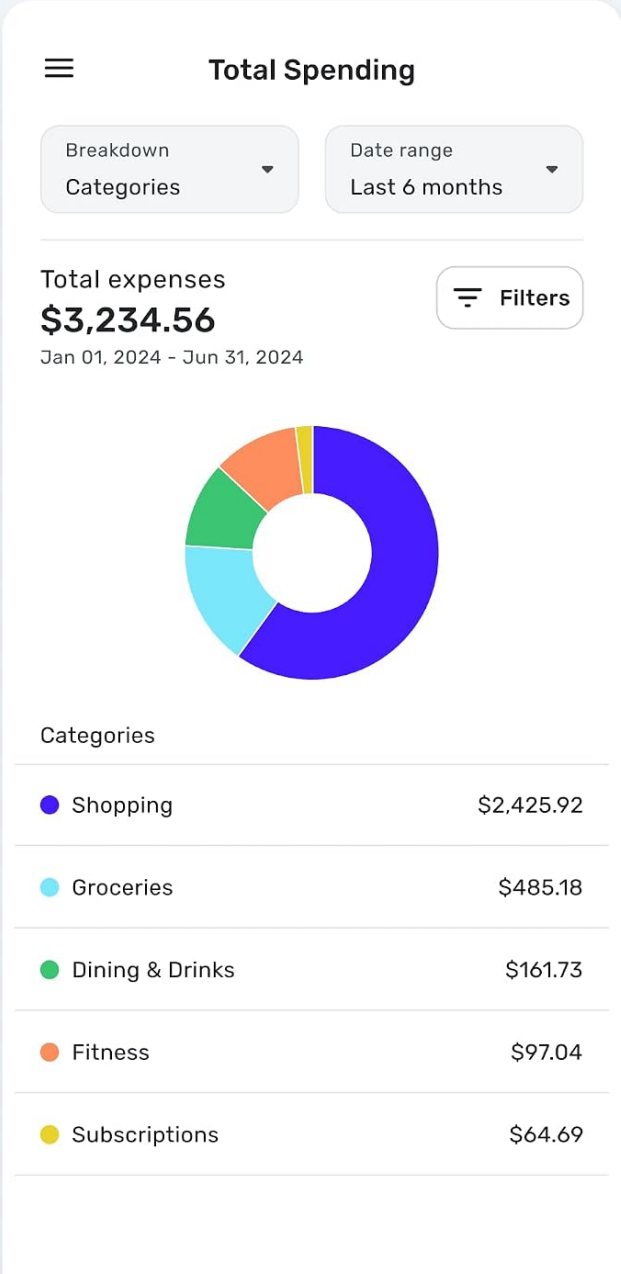


Image: A comparison table outlining features and platforms for different Quicken products, including Simplifi, Classic Deluxe, Classic Premier, and Business & Personal.

SUPPORT & WARRANTY

For further assistance or detailed support, please refer to the official Quicken Simplifi support channels:

- **Online Help Center:** Visit the Quicken Simplifi website for a comprehensive knowledge base, FAQs, and community forums.
- **Customer Support:** Contact Quicken customer support directly via their website for personalized assistance.

This product is an online code for a 1-year subscription. Specific warranty details for software subscriptions are typically outlined in the End User License Agreement (EULA) provided during activation. Please review the EULA for complete terms and conditions.

ASK A QUESTION ABOUT THIS MANUAL

Ask about setup, troubleshooting, compatibility, parts, safety, or missing instructions. Manuals+ will review the question and use this page's manual context to help answer it.

Name

Anonymous

Email

you@example.com

After a successful submission, we securely hash the supplied account or form email before sending it to Microsoft Advertising for conversion attribution. [Privacy details](#).

Question

Example: How do I reset this device or fix this error?

Details

Model number, symptoms, what you tried, or the section of the manual you are using.

Submit question