

ARCHIVING QUICKEN FILE

THIS IS THE **RECOMMENDED** METHOD

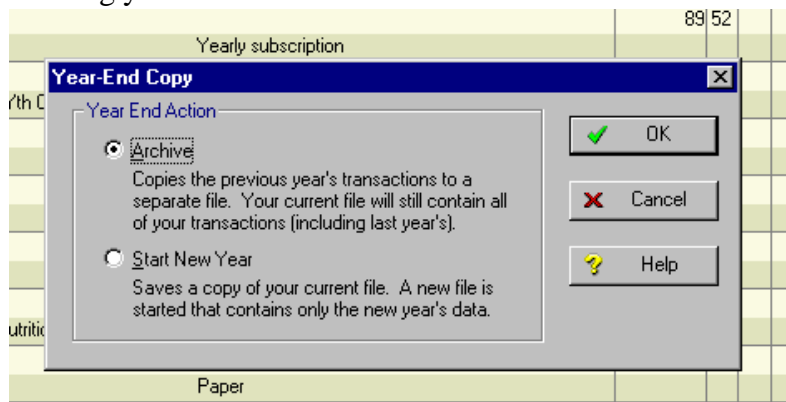
The *Archive* option makes a copy of all transactions in the current file dated earlier than the current year. Give the file copy its own name (for example **FY2003_04**). The current file is untouched and remains your working file. It still contains all your past transactions.

When you select the Archive function, Quicken creates the archive file and then asks which file you wish to use, the archive or the current file. You should never need to make changes in the archive file.

Archiving your files allows you to preserve the previous year's transactions, yet gives you access to all the past history in your current file. This access may be useful for reports you wish to generate that compare one year to another.

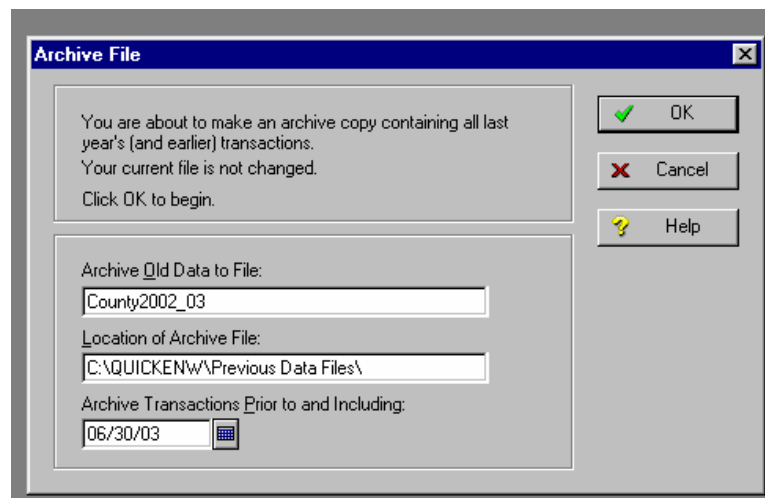
Before you begin the archiving process, create a new folder in your Quickenw folder or some other folder on your C drive. Call the new folder **Previous Data Files**. Then return to Quicken.

From the *File* drop down menu, select *File Operations* and the option called *Year-End Copy*. Selecting it will bring you to this screen.



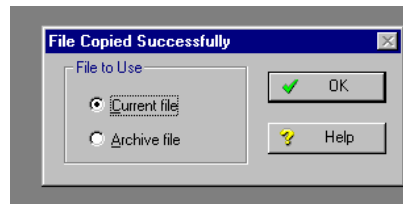
BE VERY CAREFUL HERE!!!!

Select *Archive*, then click “OK”. You should then see the following screen.



In the top box type your **county name** and **FY2003_04**. In the middle box type the location of the new folder you just created and its name. In this case the new folder is on the C drive indicated by the **C:**, in the Quickenw folder indicated by **Quickenw** and the name of the folder is **Previous Data Files**. Then click “OK”. Your file will be copied to the new file. When it is done the following message will appear.

Make sure that the *Current file* button is clicked, then click “OK”. You should return to your current file and can continue on to the next fiscal year.



THIS METHOD IS NOT RECOMMENDED

The *Start New Year* option saves a copy of your current file, and then deletes any transactions in the current file that aren't in the current year. In other words, your current file will go back no earlier than July 1 of the new fiscal year. However, investment transactions and uncleared transactions aren't deleted, regardless of how old they are. This option only allows you to use the current year's transactions in reports, etc.