Appendix B: Aggravating Things About Quicken

In This Appendix

- Missing keyboard shortcuts
- Misleading bank balances
- Changing category status
- Undoing custom forms

I suppose there are reasons why our computer programs don't always do the things we want them to. For example, why would you ever buy a new program if the program you already have can take care of all of your computing issues? I could digress about how every time a new program comes out, the software company tells us that this new model will do everything we need, until next year when the next new model comes out. Do our needs change that much each year? But I won't go off in that direction, no sir. I'll just say that it's probably really hard for computer programs to please everyone, so the things that aggravate me about Quicken might not bother you at all, and you might have your own completely different set of features you don't like about your Quicken program. No matter. Just wait a year and another new model will be out, guaranteed to tick off somebody.

Closing Windows Is Trickier Than It Should Be

As a QuickBooks user, I've gotten really used to being able to close any window on my QuickBooks screen by simply pressing Esc. With Quicken, closing windows isn't quite so easy.

Alt+F4 always works to close a window in Quicken, so I guess that's good to know. The problem is that sometimes I've used Alt+F4 to close a report, and the whole Quicken program closes too. Open a little window like Edit Category, and Esc closes that window, leaving the program open.

You can always rely on the little X in the upper-right corner. That closes any window, but it also involves clicking, which sometimes I'd rather not do. When I've been having a bad mouse day, I'd just as soon use the keyboard to get the job done. And that brings me to my next aggravating feature.

Many Quicken Buttons Have No Keyboard Equivalent

Maybe I'm just hung up on using the keyboard with my Quicken program, but I think some people are just keyboard people and other people are mouse people. Maybe it's because I learned to type long before computers even existed (my graduation present from 8th grade was a non-electric typewriter, and believe me, it was a big deal). Or maybe it's just because I spend so much time at the keyboard and I'm basically lazy and don't want to have to reach for the mouse when my fingers are already on the keys. Or maybe it's that I wish they had come up with a name other than mouse for the little clicker thing — it just sounds so childish . . .

But back to the point. If you open any one of the Centers in Quicken — try the Cash Flow Center, for example (see Figure B-1) — just look at all those buttons! You've got buttons for adding accounts and editing accounts and showing the calendar, and all sorts of other tasks, but none of them are within reach of my fingers on the keyboard.

I know, I can use keyboard shortcuts to get to the menus, but that takes extra steps. So it looks like I have to get friendly with that little clicker thing if I'm going to use Quicken.

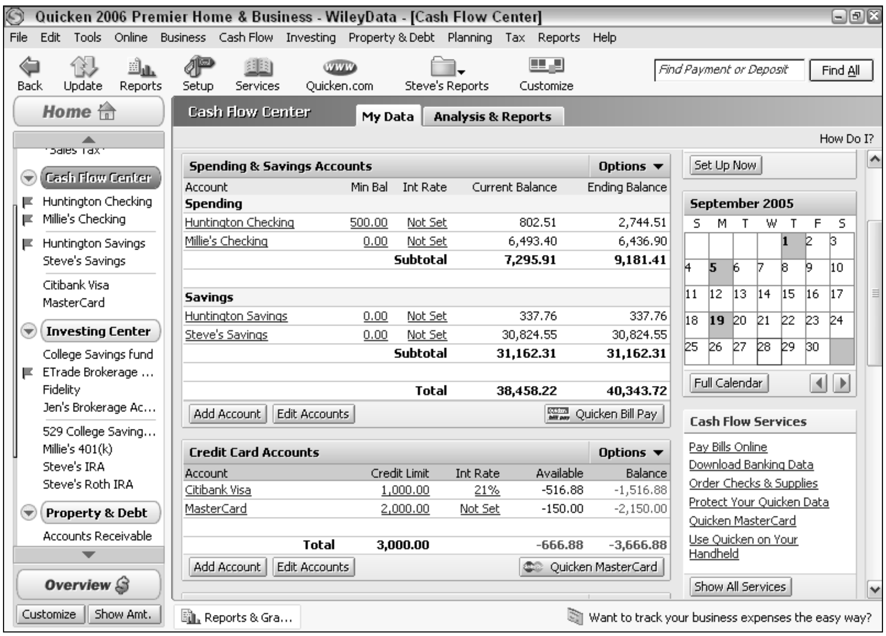


Figure B-1: Hmmm. There must be a keyboard shortcut here somewhere . . .

Savings Goals Shouldn't Change the Balance in Your Bank Account

The whole concept of savings goals is interesting, but it's a little confusing when you use a savings goal and look at your bank account balance — it looks like you have a lot less money in the bank than you actually do.

I like the Savings Goal feature — it's an easy way to keep track of how long before I can afford to take that Caribbean vacation I'm dreaming of. However, I'm not sure I like having the balance in my account altered to accommodate the amount I've allocated for the savings goal (see Figure B-2).

If I don't remember that I've got so much money put away for the trip, I might panic when my car breaks down and I really need some emergency cash to do the repairs. There has to be a better way to keep track of savings goals without actually changing the display of the bank account balance.

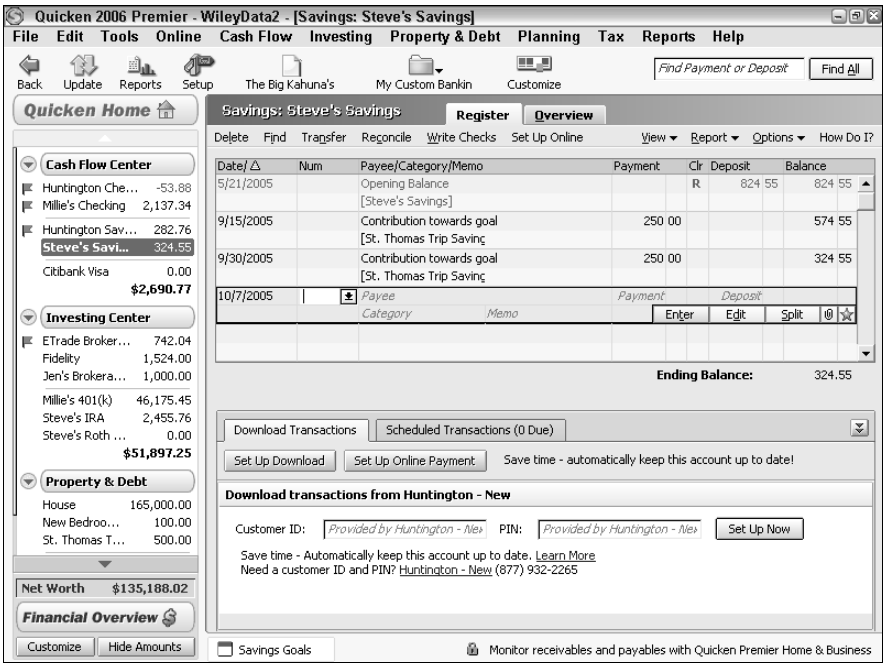


Figure B-2: Take a look at the ending balance — I know I have more money than that!

Changing Categories to Subcategories Is Too Difficult

Changing the hierarchy of categories is annoyingly difficult in Quicken. If you're familiar with QuickBooks, you know that in that program, you just open the Account List or the Vendor List or whatever list, (like a Category List), and slide the item right and left to move to a new level of hierarchy, or up and down to move to a new parent.

In Quicken, if you want to change the subcategory status of a category, you have to open the Category List, find the category, and click Edit. Moving to a lower level of subcategory is easy. Moving up to a top-level category is not impossible, but just not quite as intuitive. You have to select Income or Expense as the category type, and then the subcategory goes away.

I know I was complaining about having to use the mouse earlier, but sometimes a little click and drag is just what the doctor ordered.

Undoing Custom Forms Is a Pain

If you took my advice in Book VIII and started customizing your business forms, it's quite possible that you got carried away with font experimentation. Don't be ashamed — it happens to the best of us. You see a font that looks really cool in the sample screen, and then you plaster it all over your company invoice form and suddenly you realize you just aren't cut out to be a form designer (see Figure B-3).

But wait! What was that font that was there before you started down the path of form redesign? I'll bet you've forgotten. And now you have to experiment with more fonts in what is bound to be a futile attempt to make the form look like it did before you got creative.

Wouldn't it be nice if there were a little Font Reset button so you could just click Fonts, and then click Reset to send all the weirdo fonts scurrying back into their holes? No such luck. But before you waste any more time trying to figure out how the fonts used to look, and before you give up and decide to trash the form you worked so hard to design, here's a list of the original Quicken form font selections. You can click the Set Fonts button on the left side of the Forms Designer, and then use these settings in the Set Layout Fonts dialog box (Figure B-4) to bring sanity back to your customized form.

Titles Font: Arial Regular 10

Company Address Font: Arial Regular 12

Title Text Font: Arial Bold 24

Total Font: Arial Bold 18

Data Font: Arial Regular 9

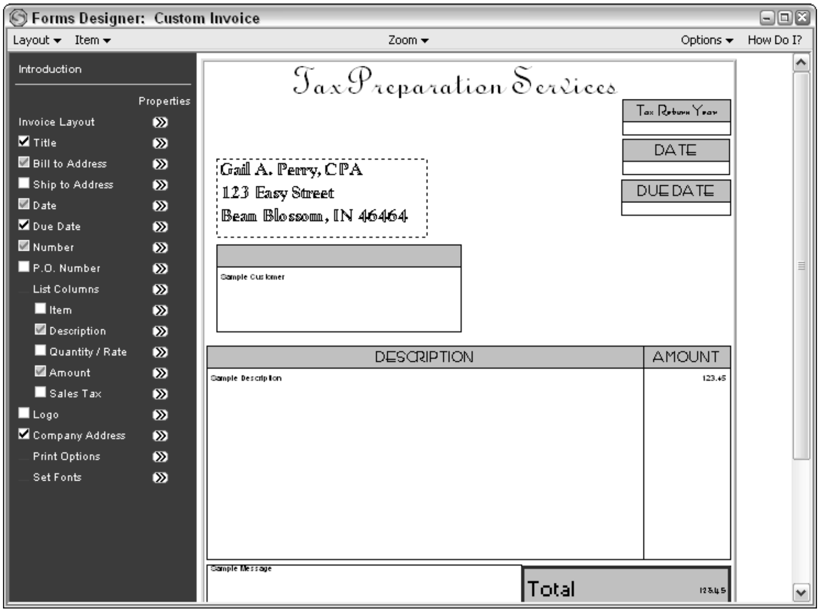
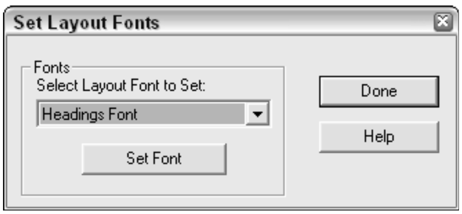


Figure B-3: My invoice form, on drugs . . .

Figure B-4: For each type of title, there is a standard font. The trick is remembering what that font is.



So, What's Your Gripe?

If you have stories to share about your own Quicken aggravations, send them to me at `QuickenGripes@funwithtaxes.com` and I'll try to address them in the next edition of this book.