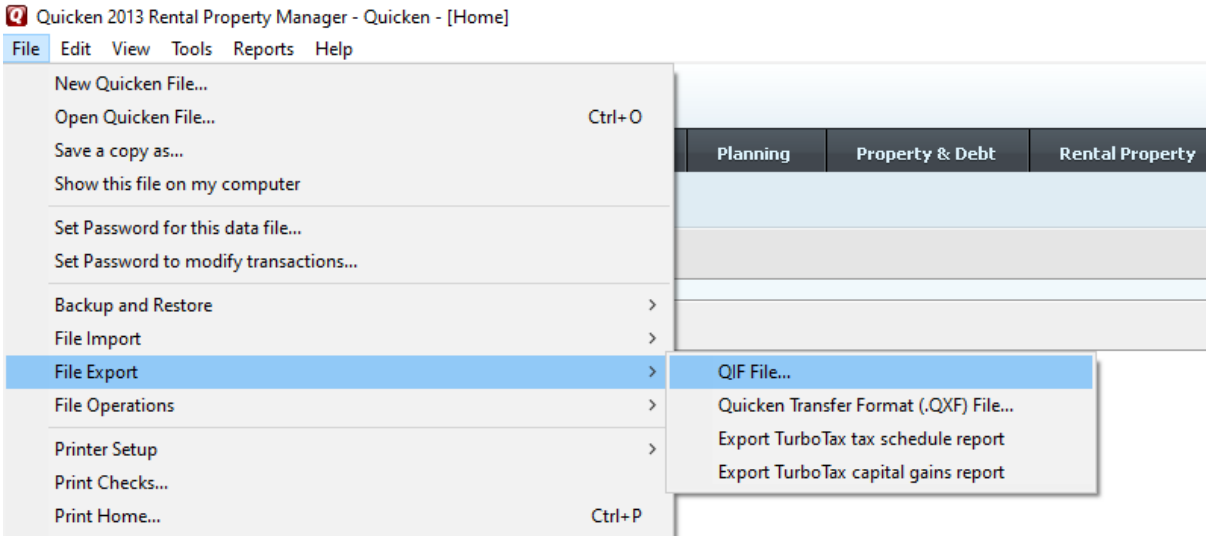
How to: migrate data from Quicken

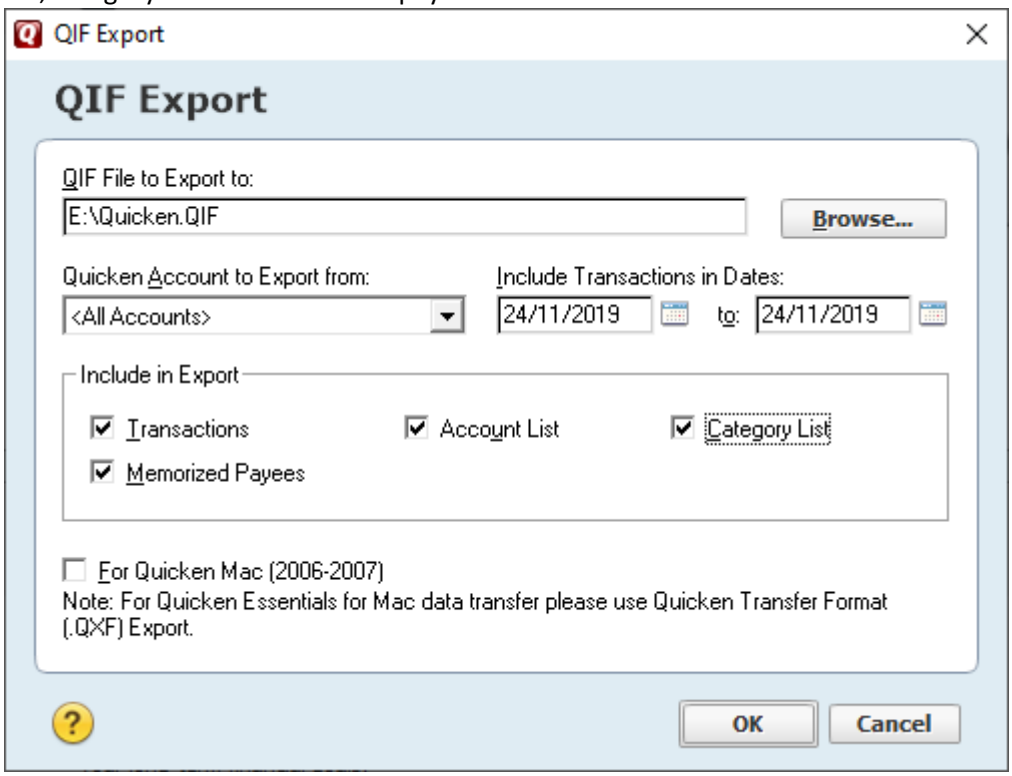
Export data from Quicken to a QIF file

To migrate data from Quicken, export one QIF file that includes all accounts and related lists:

1. Go to File->File Export->QIF File…



2. Select file to export to, ensure you export "<All Accounts>", include transactions, account list, category list and memorized payees

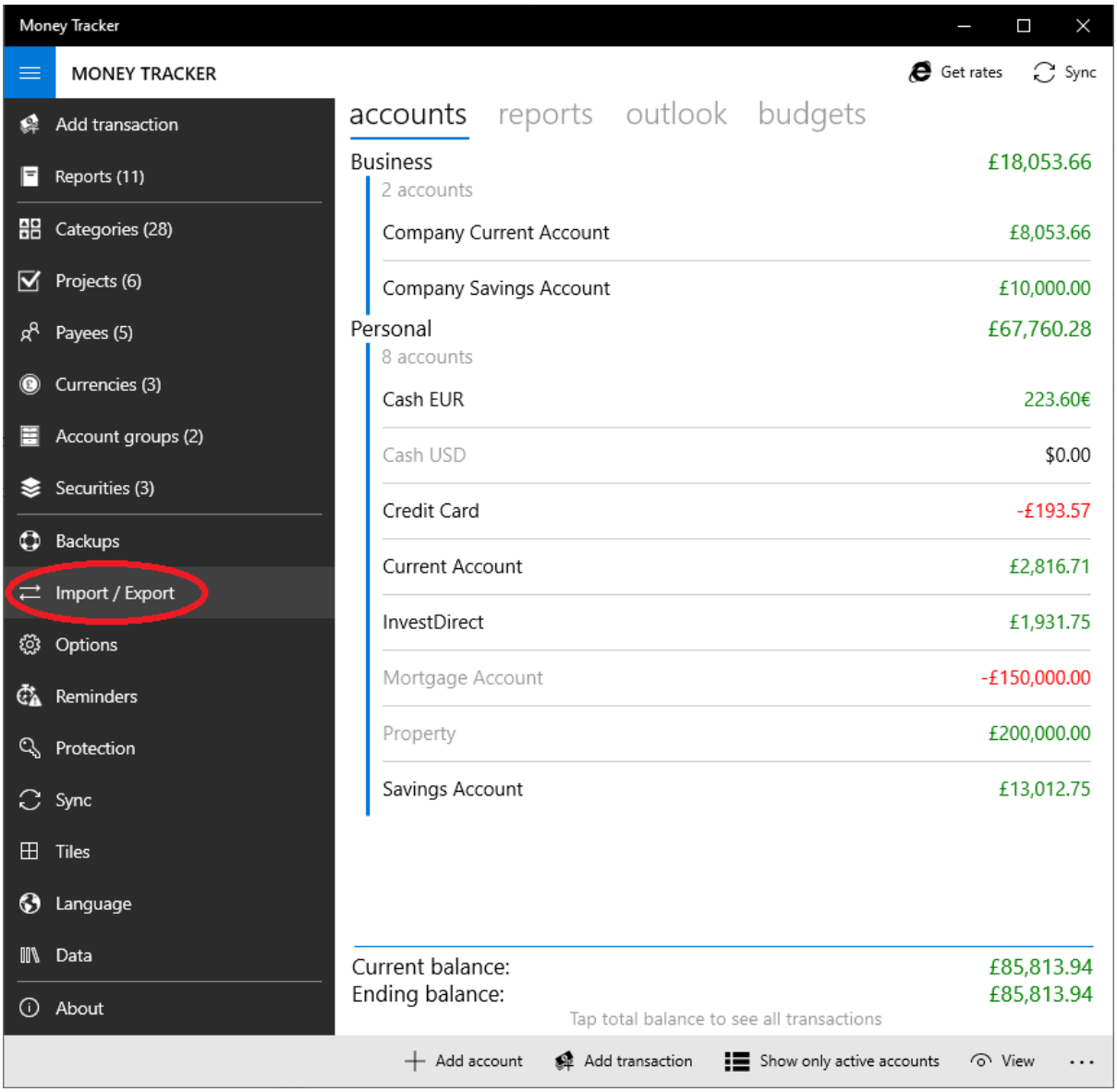


3. Click OK to finish the export

Import data from QIF file to Money Tracker

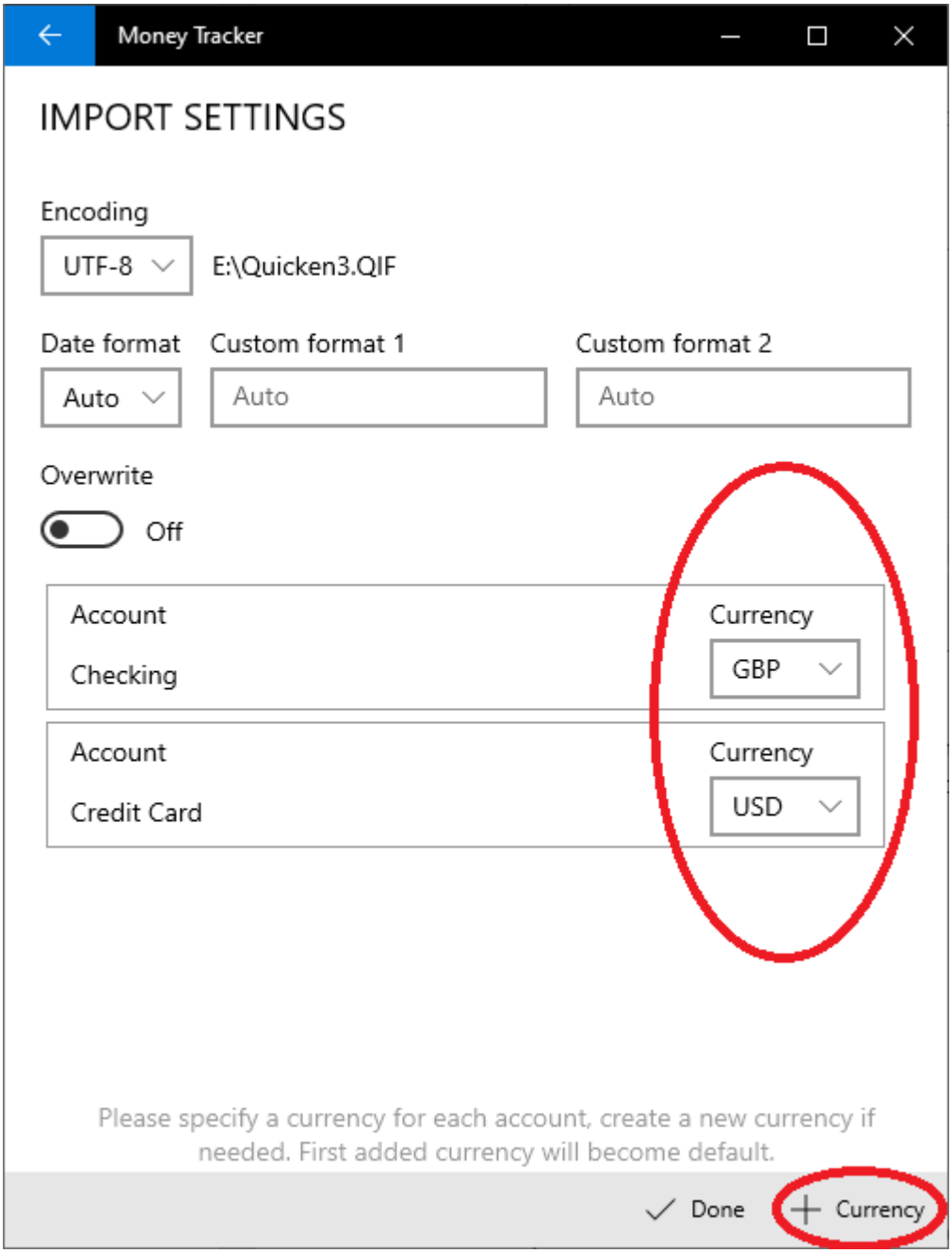
When QIF file is ready launch Money Tracker, then:

1. From the left sidebar click “Import/Export”

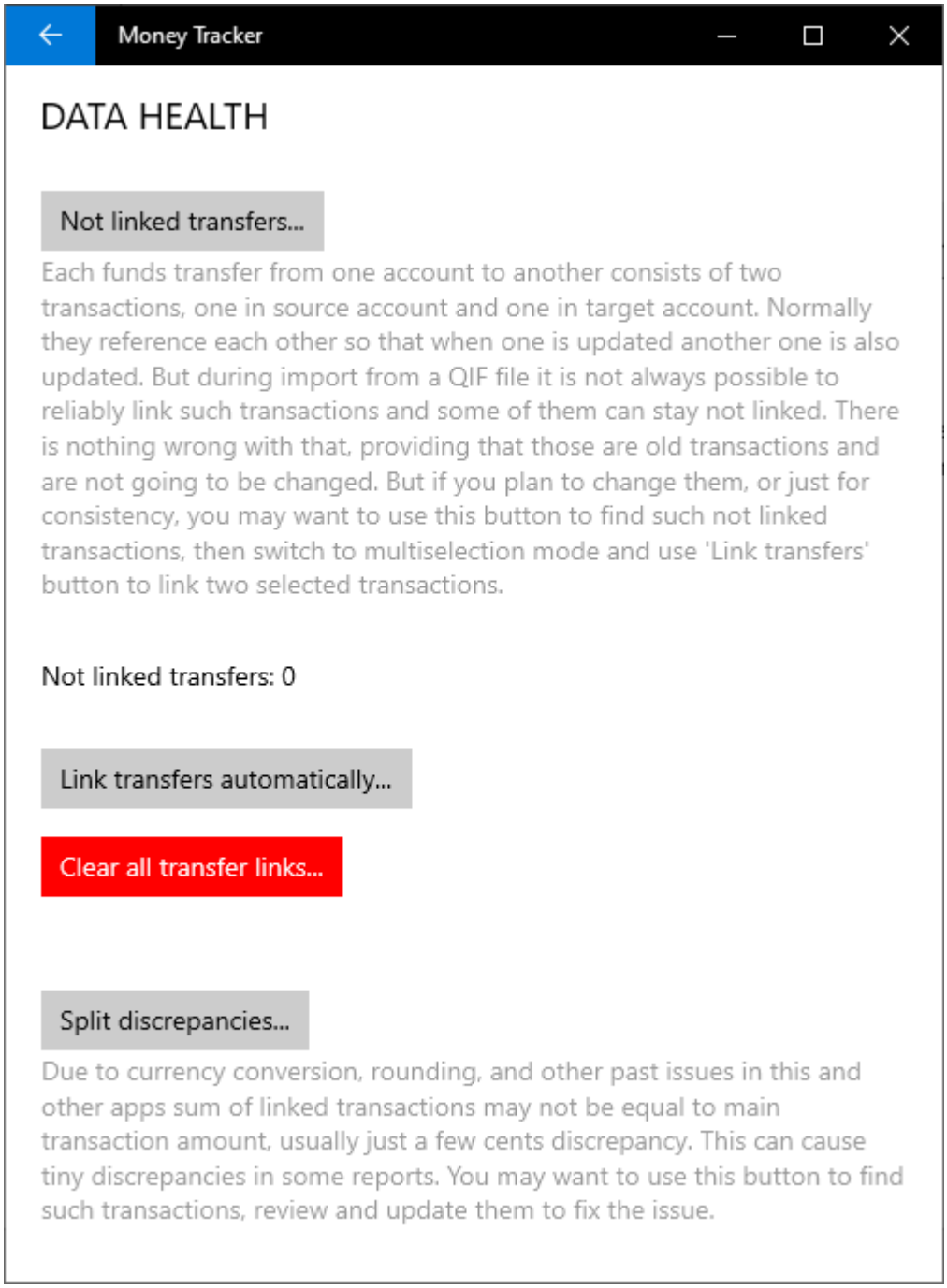


2. Click or tap “Import from QIF”

3. Select a previously exported QIF file
4. Read the import hints in grey
5. Select encoding, in most cases it should be UTF-8 (if you have any issues with it please try others in this order: ANSI, Windows-1250, Windows-1251)
6. Assign currency to each imported accounts (read the hint at the bottom, use “Currency” button to add new currencies if needed, first added currency will be default and will be assigned to all imported accounts automatically, you can change this at any time)

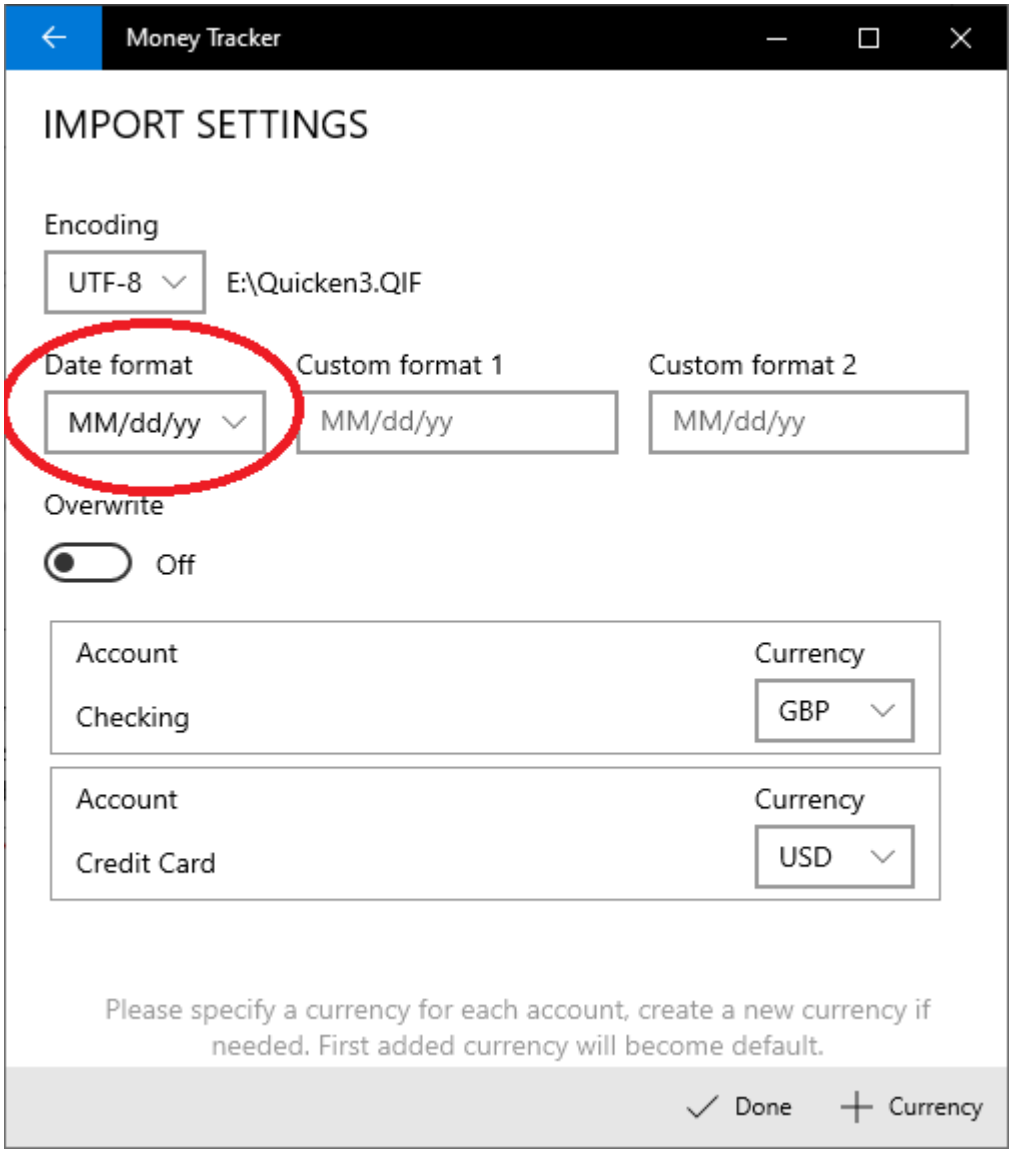


7. Click Done, and if no errors please go back to Accounts screen and review the data. If you get any errors, see below.
8. After all accounts were successfully imported please go to main screen, click “Data” from left sidebar, then click “Data health…” and review not linked transfers (see hints) and split transactions discrepancies



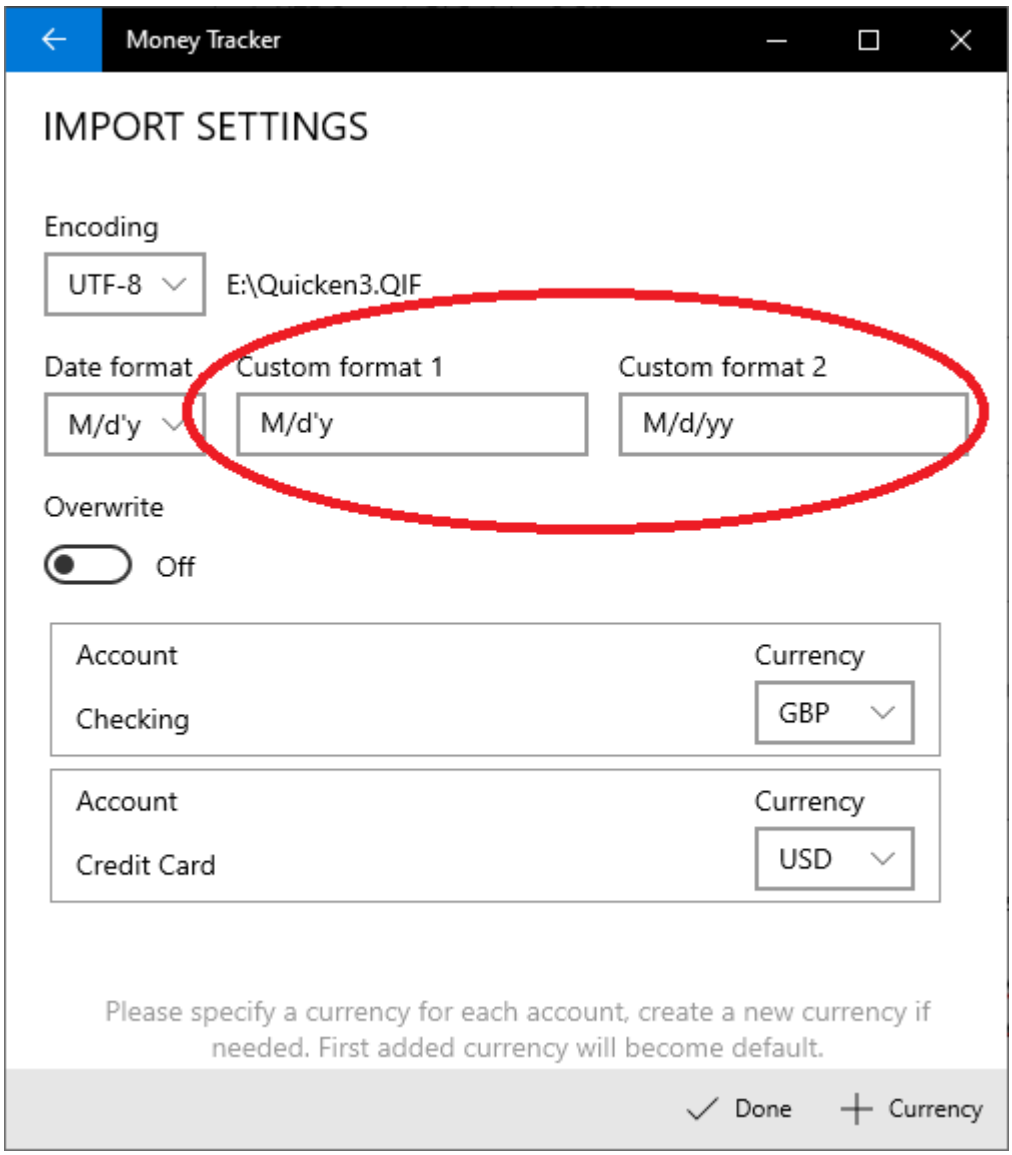
If you get any errors during import most likely the app cannot recognize transaction date format, to fix this you may need to change “Date format” from Auto to desired, for example MM/dd/yy where:

- MM - month
- dd - day
- yy – 2 digits year
- yyyy – 4 digits year



If an account has transactions before year 2000 you may need to specify custom format as Quicken exports dates like this:

- United Stated: M/d'y for dates after year 2000 and M/d/yy before year 2000
- UK: dd/MM'yyyy for dates after year 2000 and dd/MM/yyyy before year 2000



Please contact support team support@k-tech-systems.com if you have any issues.