

Quote Loader Extension Version 2 for Moneydance 2022-2024

Create On Demand and Scheduled Auto Run at defined time on Windows.

PDF V 1.2

Use at your own risk

Tested on Windows 10 & 11

Create On Demand and Scheduled Auto Run on Windows. Both open Moneydance, then runs Quote Loader (as denoted by quotes appearing in the status line at the bottom of the Moneydance window). On completion closing Moneydance. Both can be initiated as many times per day as you want. It is suggested this process is tested on a restored backup to ensure the expected results are obtained. If you have several Data Sets you can setup several differently named Batch files and short cuts. Experienced users can adapt the Batch files to meet their own needs.

Creating this feature is a twostep process. You can also create a shortcut icon to run at any time.

1. Create a Batch (.bat) file.
2. Set up Windows Task Scheduler.

Create a Batch (.bat) file

If you have several Data Sets you can setup several differently named Batch files and short cuts.

The Batch file contain the command lines defined in the PDF Quote Loader Extension Version 2 Advanced User Into Writing Scripts section.

Namely:

```
set md_passphrase=xxx
```

where xxx is your Moneydance Data Set password.

```
"c:\Program files\Moneydance\Moneydance" "c:\Users\zzz\moneydance\Documents\yyy.moneydance" -invoke=moneydance:fmodule:securityquoteload:runstandalone
```

where zzz = User name, where yyy = Moneydance Data Set name.

In this example Data Set password xxx = test, Moneydance User Name zzz = derek and Data Set Name yyy = Quote Loader Examples

Remember to substitute the RED text with your own Data Set password, User and Data Set Names.

If you have not set a Moneydance Data Set password just leave test in the Batch file.

Thus the two lines become:

```
set md_passphrase=test
```

```
"c:\Program files\Moneydance\Moneydance" "c:\Users\derek\moneydance\Documents\Quote Loader Examples.moneydance" -invoke=moneydance:fmodule:securityquoteload:runstandalone
```

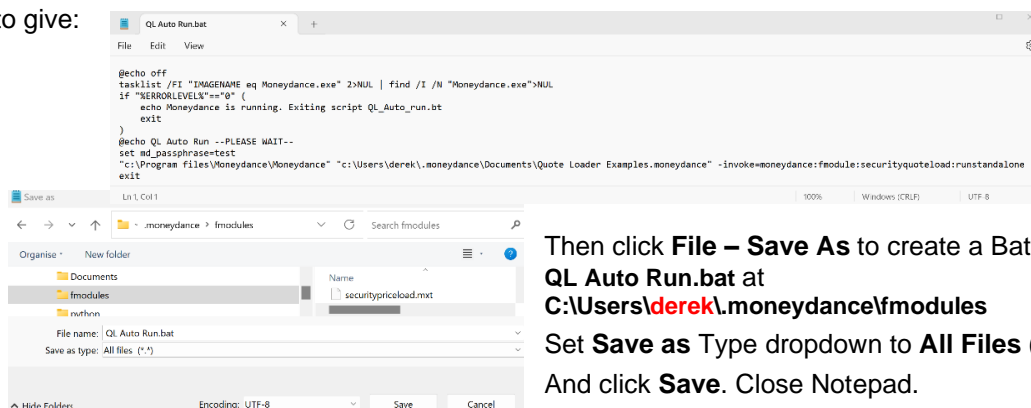
You can create a batch file that contains these commands as follows.

Note: If Moneydance is already open then the test starting tasklist will exit the batch file without closing Moneydance or attempting to run the section of the batch file **QL Auto Run**.

Type **Notepad** into Windows Search box in taskbar, open Notepad and paste the following commands. Ten lines only. Line nine starting "c: ending :runstandalone as one line. You may need to edit to achieve one line.

```
@echo off
tasklist /FI "IMAGENAME eq Moneydance.exe" 2>NUL | find /I /N "Moneydance.exe">NUL
if "%ERRORLEVEL%"=="0" (
    echo Moneydance is running. Exiting script QL_Auto_run.bt
    exit
)
@echo Quote Loader Auto Run --PLEASE WAIT--
set md_passphrase=test
"c:\Program files\Moneydance\Moneydance" "c:\Users\derek\moneydance\Documents\Quote Loader Examples.moneydance" -invoke=moneydance:fmodule:securityquoteload:runstandalone
exit
```

to give:



Then click **File – Save As** to create a Batch file called **QL Auto Run.bat** at **C:\Users\derek\moneydance\fmodules**

Set **Save as Type** dropdown to **All Files (*.*)**

And click **Save**. Close Notepad.

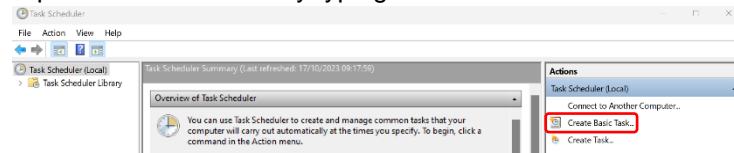
Create a short cut icon on the desktop so you can run the Batch file at any time.

In Explorer navigate to **C:\Users\derek\moneydance\fmodules**. Right click on **QL Auto Run.bat** and select **Create shortcut** and move it to you Desktop. Double clicking on the shortcut will open a Command Window, then after a delay initiate QL Auto Run. Depending on the speed of your PC this came take some time.

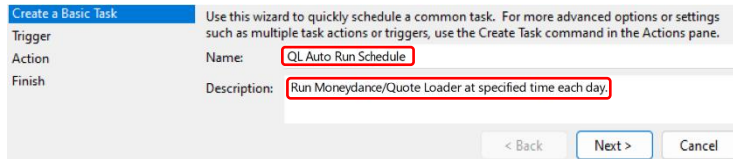
Note: If Moneydance is running when the short cut is used, the Batch file exists and the current Data Set remains open.

Set up Windows Task Scheduler

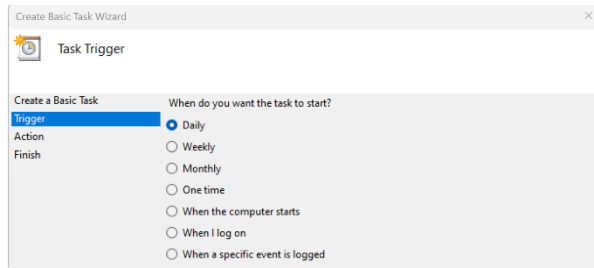
- Open Task Scheduler by typing **Task Scheduler** in the search box on the taskbar.



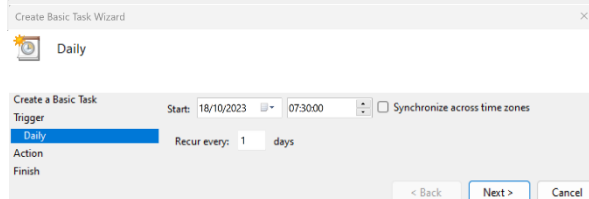
- Click on **Create Basic Task** on the right pane of the Task Scheduler window.



- Enter a name and a Description for your task and click **Next**.

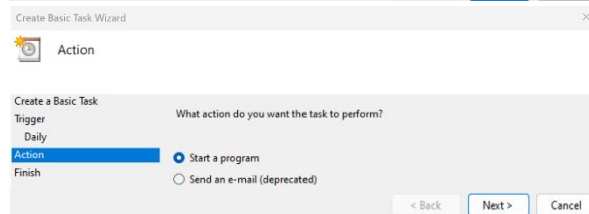


- Choose when you want the task to start (daily, weekly, monthly, etc.) in this example **Daily** and click **Next**.

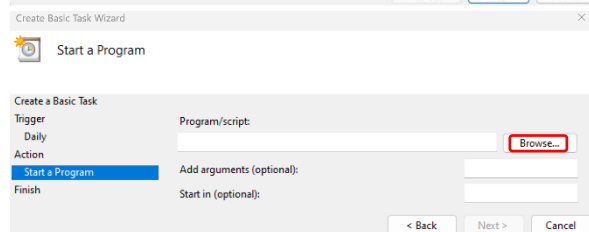


- Specify the date and time for the task to run. In this example every day (Recur every 1 day) at 07:30 starting on the 18/10/2023

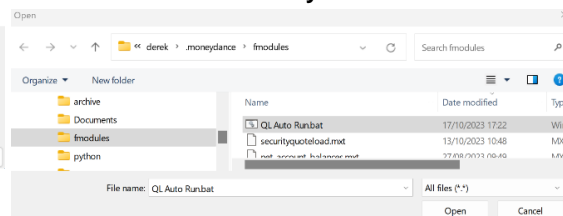
To run multiple times on the same day, see section **Modifying Task Scheduler Settings – Triggers**. Click **Next**.



- Choose **Start a program** as the action and click **Next**.

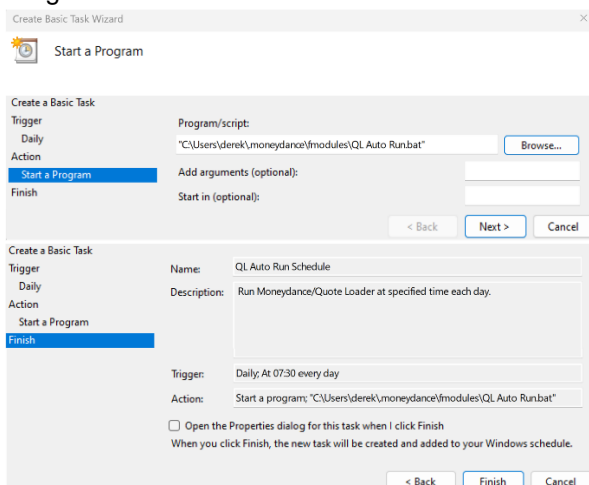


- Use **Browse** to select **QL Auto Run.bat** at **C:\Users\derek\moneydance\fm modules**



and highlight **QL Auto Run.bat** and click **Open**

To give:



- Click **Next**

In this example every day at 07:30 you will see Command Window open and assuming Moneydance is not already open run the Batch file followed by Moneydance opening and Quote Loader updating prices as denoted by quotes appearing in the status line at the bottom of the Moneydance window. On completion Moneydance will close followed by the Command Window. Click **Finish** to create your task.

You can now close Task Scheduler.

Task **QL Auto Run Schedule** will run automatically. If you have more than one Data Set you want to run simple set up new tasks under different names by following the process above.

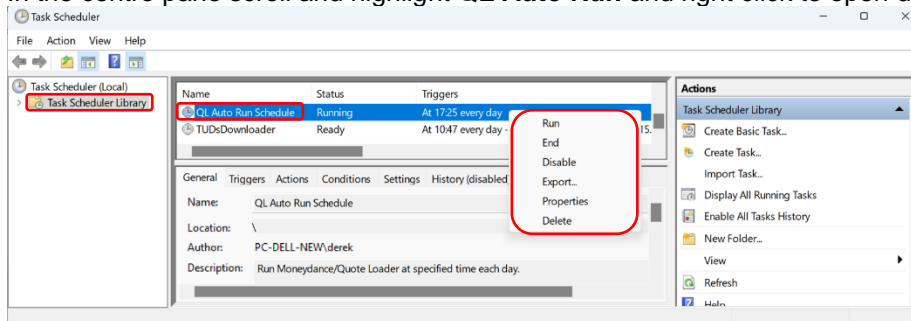
Job Done!

Modifying Task Scheduler Settings.

Open Task Scheduler by typing **Task Scheduler** in the search box on the taskbar.

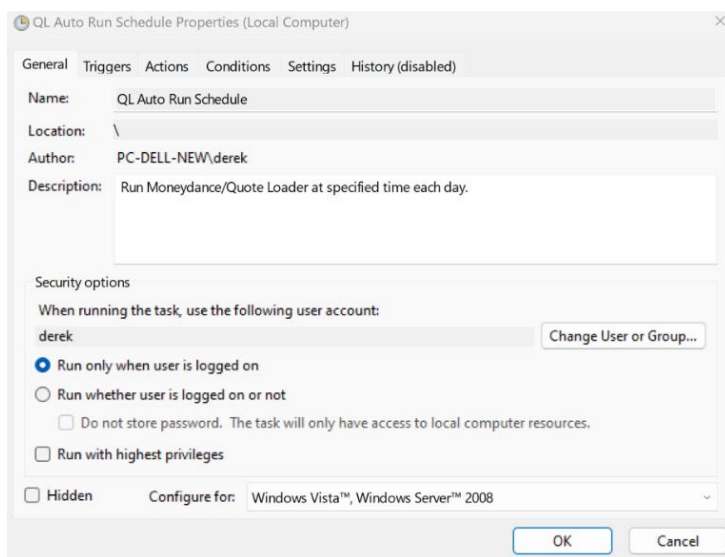
In the left pane highlight **Task Scheduler Library**.

In the centre pane scroll and highlight **QL Auto Run** and right click to open dropdown.



You can select a number of operations to act on the task including **Run**, **Disable** (Enable), **Properties** (open the task) and **Delete**.

Selecting **Properties** opens the following window. Default settings were used in the example.

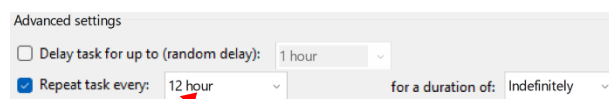


This shows several options that can be selected.

Clicking on the Tabs allow changing further settings.

Triggers – provides information of when the task will run and allows an **Edit** of these.

Note: When in **Edit**, **Advanced Section** allows a **Repeat task every x, Indefinitely**, when box ticked.



Actions – show the path to the Batch file and allow an **Edit**.

Set using Dropdowns: Number (x) can be edited. In the example this would result in a run at 7am and 7pm

Conditions – set conditions that permit the Batch file to run, including **Wake the computer to run this task**.

Settings – additional setting including **Run task as soon as possible after scheduled start missed**.

These tabs allow many other selections.

Expert Users.

Experienced users can adapt the Batch file to meet their own needs. For example if you have more than one Data Set you could create a Batch file to process all required Data Sets in one go and thus have one desk top short cut and one Task Scheduled.

So try out this process and

HAVE FUN

Derek Kent