

How do I create an invoice reminder?

Invoice reminders make invoicing your customers and paying your vendors a lot easier. When reminders become due, you can choose what happens next—Quicken can simply alert you, or Quicken can enter a transaction into the register for you automatically.

When an invoice reminder is entered into your account register, Quicken updates the values in the [Cash Flow](#) and [Profit/Loss](#) snapshots, which help you stay on top of your spending and understand how your business is doing.

Get started with invoice reminders

To create an invoice reminder

1. Click the **Bills** tab.
2. Choose **Add Reminder**, and then select **Invoice Reminder**.
3. Enter the vendor or customer name, and then click **Next**.
4. In the **Type** field, select whether the reminder is for an invoice or payment.
5. Add or edit the **Due Next On** date and schedule.
 - **Start date**
The date of the next occurrence of the reminder.
 - **How often**

Frequency	Explanation
Weekly	The transaction repeats every [n] weeks on a specified day of the week.
Bi-weekly	The transaction repeats every [2] weeks on a specified day of the week.
Monthly	The transaction repeats every [n] months on a specified date (for example, the 4th) or a specified day (for example, the first Thursday).
Twice a month	The transaction repeats twice monthly on two specified dates (for example, the 4th and the 15th), or on one specific day plus the last day of the month.
Quarterly	The transaction repeats four times per year (every three months), based on the specified start date.
Yearly	The transaction repeats once each year on the specified start date.
Twice a year	The transaction repeats twice yearly on two specified dates (for example, December 10th and April 10th). This option is perfect for property tax reminders.
Only once	The transaction occurs just one time, on the specified start date. It does not repeat.
To pay estimated taxes	The transaction repeats on the dates shown when the option is selected.

- **End date**
Select this option to specify the end date, if any, or the number of occurrences of the reminder.
6. Click **Add invoice details**. This will display the proper invoice or payment form. Click the Help icon if you need assistance completing the form.
 7. Add or edit the **Optional Settings** for the reminder.

Remind me [n] days in advance

Select this option to enter the number of days in advance of when the reminder is due that you want to be reminded of it.

Automatically enter the transaction in the register [n] days before the due date

Select this option to enter the number of days in advance of when the reminder is due that you want to trigger the reminder and automatically enter it as a transaction in your register.

Use only business days for reminder

Select this option to count only business days when calculating the reminder due date. Quicken will disregard holidays and weekends.

Related website

Select this option to enter a Web address (URL) for the biller or financial institution. This is linked to in the Web column of the [Manage Bill & Income Reminders](#) list.

Sync to Outlook

Select this option to transfer the reminder to your Microsoft Outlook calendar.

To learn more, see [Sync your Quicken reminders with Outlook](#).

Print check with Quicken

Select this option if you plan to print the transaction on a paper check.

Make this a repeating online payment

Select this option to create a repeating online payment instruction for the reminder.

A repeating online payment is a series of online payments that are made on a schedule that you determine.

A repeating online payment instruction is sent to an online bill pay service, such as Quicken Bill Pay or your financial institution, and they make payments on your behalf without the need to go online each time the payment is due.

This option is available only for accounts that are activated for online bill payment.

To activate online bill payment, choose Tools menu > Account List, click the Edit button next to the account to you want to activate, click the Online Services tab, and then click the Set up now button.

For more information, see:

- [The Bills tab](#)
- [Projecting business cash flow](#)

This feature requires Quicken Home, Business & Rental Property. Learn how you can [upgrade Quicken](#) in minutes.