


How do I manually enter a transaction?

Most of the time, you'll update your spending accounts by downloading transactions and balances directly from your bank. However, you may choose to have a manual (offline) account or have another reason to enter a transaction.

1. Open the account you want to use.
2. In the account register, find the new transaction line. You can go there directly by typing **CTRL+N**.


If you sort the register by descending order of date, the new transaction line will appear on the top of the register.

Date	Chec...	Payee	Memo	Category	Tag	Payment	Exp	Deposit	Balance	
5/5/2021	Check #	Payee	Memo	Category	Tag	Payment	Exp	Deposit	0.00	

If you sort the register by ascending order of date, the new transaction line will appear at the bottom of the register.

5/5/2021	Check #	Payee	Category	Payment	Deposit	Amount				
17 Transactions										
Current Balance:					75,840.00	Ending Balance:		73,840.00		

3. Change the **Date** if necessary.

5/5/2021  Check # Payee

< May - 2021 >


Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Today


4. If this is a check, enter the check number in the **Check #** column.




About register columns

The next few steps below discuss entering information in specific register columns. If a register column does not appear in your register, you can add the column using the **Register Columns** tool .

Select the checkboxes for the columns you want to add, then click **Done**.





<input type="checkbox"/>	Amount
<input type="checkbox"/>	Attachments
<input checked="" type="checkbox"/>	Balance
<input checked="" type="checkbox"/>	Category
<hr/>	
<input checked="" type="checkbox"/>	Action buttons

 Done

5. In the **Payee** column, indicate who receives this payment or gives you this deposit.
6. In the **Payment** column or **Deposit** column, enter an amount.
7. In the **Category** column, assign a **category** to the transaction.
8. In the **Tag** column, tag the transaction. (Optional)
9. In the **Memo** column, enter a note. (Optional)
10. If this transaction can be counted as a [reimbursable expense](#), select the checkbox in the **Exp** (Expensed) column. (Optional)



This is not a default column. If you track [reimbursable expenses](#), you will need to add this column using the  button at the top right of your register.

11. Click the **Save** icon  to save the transaction. You can also use the **Enter** key to save the transaction.

Notes

Tell me more about downloading transactions

To learn more about how you can automate much of your transaction entry, see [Tell me about updating transactions and balances from my financial institutions](#).


Tell me more about what I see in the register

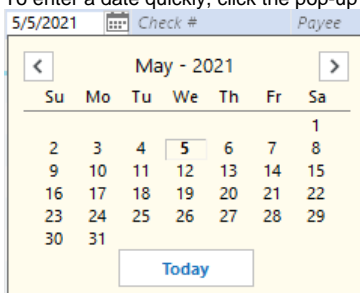
- Reconciled and cleared transactions are dimmed.
- Future transactions are separated by a blue line and use gray text.

Date	▼	Check #	Payee	Category	Ⓜ	Payment	Ⓜ	Deposit	Amount	Balance
5/5/2021										0.00
5/7/2021			Rental Associates	Home:Rent		2,000.00	R		-2,000.00	73,840.00
4/7/2021			Leroy	Health & Fitness:Sports		400.00			-400.00	75,840.00

- The transaction that you're currently working with has a pale blue background.
- As you work in a Quicken register, a number of different icons can appear in the Status column. See [Status column icons](#) to learn what they mean.

Tell me more about entering dates

- You don't have to type the slashes or the year, because Quicken has already entered the current year.
- To enter a date quickly, click the pop-up calendar icon  at the right of the **Date** field, and then click a date.



Can I customize the Check # field?

The **Check #** field has several predefined transaction types; you can add customized types as well. To add a new type:

- Click the drop-down arrow icon on the right side of the column cell.
- Click **Edit List**.
- Click **New**. Enter a name, click **OK**, then **Done**.
- To delete an item, select the item and click **Delete**.

My payee list is long and cluttered...what can I do?

If your payee drop-down list contains payees that you no longer need, [delete them](#) from the Memorized Payee List.

Tell me how to use the pop-up calculator to enter an amount

Click the calculator icon in any field in which you enter an amount; Quicken displays a pop-up calculator. Use the calculator buttons (or use the number keys in the top row of your keyboard) to calculate amounts, and then click Enter to place the amount in the field.

Tell me more about entering categories

The category drop-down list is divided into several groups such as **Personal Income**, **Personal Expenses**, **Transfers**, **All Categories**, and so on. Choose the group you want to work with, and then select the specific category.

Depending on your payee information, [Quicken may suggest a category](#).

To enter a transaction with multiple categories, click the **Split** button.

Can I transfer money between Quicken accounts?

Yes, you can. When you transfer money between accounts, one account balance increases and the other account balance decreases—but your net worth remains the same. Quicken records a transfer in your "transfer from" account register and creates a parallel transaction in the "transfer to" account. For more information, see [Transfer money between accounts](#).

Can I customize my account register?

Yes. Each time you record a transaction, Quicken sorts it in the register—the default is to first sort by date and then by check number. You can also sort a register by clicking on a column heading. You can also change the appearance and behavior of a spending account register by changing [register options](#), [register preferences](#), and [QuickFill preferences](#).

Are there any columns I can't edit?

- Leave the **Clr** field blank. (This refers to whether the transaction has cleared during reconciliation.)
- You can't edit the **Amount** or **Balance** columns. Quicken calculates them automatically.

What do the Status column icons mean?

Different icons can appear in the **Status** column as you work in a **Quicken** register. See [Status column icons](#) to learn what they mean.

Can I print my register?

You can print transactions from Quicken's registers for a specified range of dates. You can also choose whether to print details for split transactions. Transactions will print in the order you see them in the register. However, you can display them in a [different sort order](#) before printing.

What's the largest amount I can enter?

Amounts for single transactions are limited to \$99,999,999.99, while mounts for printed checks are limited to about \$14,000,000.00.

How are the inflow and outflow columns labeled in different types of registers?

Type of account	Inflow column	Outflow column
Checking accounts	Deposit	Payment
Credit card accounts	Payment (paying off your balance decreases the amount you owe)	Charge (charging items to your credit card increase the amount you owe)
Loan and other liability accounts	Decrease (diminishes the liability)	Increase (increases the amount you owe)
Asset accounts	Increase (add to the asset. value)	Decrease (diminishes the asset)

Can I copy transactions into other applications, such as Microsoft Word or Excel?

Yes. You can copy transactions from your spending account registers by holding down the Shift key, selecting a range of transactions to copy, and then choosing Edit menu > Transaction > Copy Transaction(s). Then you can switch to the other application and choose Edit menu > Paste. Note: Quicken split transaction information is not copied.