

# About reminders

Chances are your bills don't all arrive on the same day. They trickle in, and you try to pay each one in a timely fashion. To save time and effort, you can have Quicken remind you when a bill is due, then you can pay the bill the way you usually do: with a check, an online payment, or a direct withdrawal.

Remember to tell Quicken about your income, and when you expect it. Then when payday comes around, Quicken can enter your paycheck in the register automatically. You may need to make a few adjustments to the amounts, but entering at least an estimate of your paycheck is important if you want to use the **Projected Balances** graph.

This section covers the tools that help you track your personal cash flow. If you purchased Quicken Home & Business, you'll have additional tools that can help you [track business cash flow](#) as well.

## What's the difference between a bill reminder and a repeating online payment?

When you set up a bill reminder, Quicken reminds you when it's time to make the payment.

- If it's an online payment, Quicken reminds you to send the instruction (if you haven't already sent it).
- If it's a paper check, Quicken reminds you to print or write it.

The online payment service also lets you schedule payments another way by allowing you to send your online payment instructions ahead of time for both single and multiple payments. This way, you don't need to be reminded of anything. Just set the delivery date and send the instruction.

In addition, the online payment service has a special type of payment called a [repeating online payment](#). You send one online payment instruction that specifies the payment amount, as well as how often and the number of times to make that payment. The processor processes the instruction for the number of times you specify and for the appropriate delivery dates. You don't need to send the online payment instruction again. The payments continue until the last payment you specify is made or until you cancel the repeating online payment instruction.

Many people who use the online payment service like to set up repeating online payment instructions to pay regular bills that are always the same amount, such as car payments.

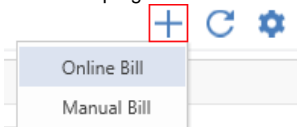
## Create a bill, income, or transfer reminder

Bill and income reminders make paying your bills 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 you finish setting up your bill and income reminders, Quicken can project your spending account balances into the future.

## Create an Online Bill Reminder

Get reminders for online bills. Enter the login information for the biller's site. Quicken automatically contacts the site and determines amount due and due date based on the information on the site.

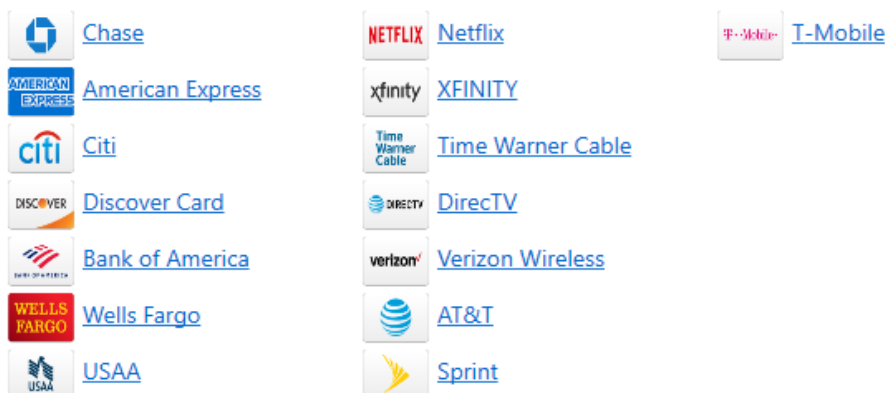
1. Click the **Bills & Income** tab. Be sure you are either in the **Bills** tab or (if you have combined tabs) are in the **Bills, Income & Transfers** tab.
2. Near the top right side of the screen, select the plus sign and select **Online Bill**.



3. Type in or select the name of your online biller.

Type the name of the biller as it appears on the biller's website.

Or start with one of these popular billers.



- For your online account, enter your login information. It may take some time to process the login and sync the account.

## Log in to Link your Bill

Enter your login information for the Planet Fitness website so Quicken can access your bill information. If you do not have a login for this biller, go to their website and set it up first.

Username

Password

Show



**Your biller website credentials are safe with Quicken**

- The security of your data is a top priority for us. We use bank-level encryption to secure your login credentials.
- Our servers are protected with state-of-the-art security monitoring, encryption and firewalls.

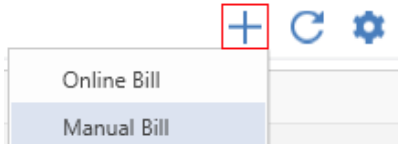


If an error occurs, check your login info and try again. You may want to log in to the payee's website, just to be sure it accepts your information.

- Click **Done** when complete. Your bill is now linked and you will get reminders when the bill is due.

## Create a Manual Bill Reminder

- Click the **Bills & Income** tab. Be sure you are either in the **Bills** tab or (if you have combined tabs) are in the **Bills, Income & Transfers** tab.
- Near the top right side of the screen, select the plus sign and select **Manual Bill**.



- Select or enter a payee. Usually, you want to set up a reminder for an existing payee, which means you can just start typing their name and they should appear. Alternatively, you can enter the name of a new payee.

**Add Bill Reminder**

Pay to:

Payee	Amount	Category
Burger King	-4.75	
Burger Lounge	-54.00	
Checking Avalon Bagels	-40.96	
Checking Eegees Date	-6.16	
Checking Eegees Speedw	-7.90	
Dollar General	-21.28	Shopping
Geico	-166.00	Auto & Trans...
Graze Premium Burgers	-44.77	
Graze Premium Burgers	-18.37	
In-n-out Burger	-17.50	Food & Dining
In-n-out Burger	-6.08	
Interest Charge	-44.32	Interest Exp
Massage Envy	-48.00	Personal Care...
Pennymac Mortgage	-1,830.00	Home:Mortg...
Public Storage	-301.62	Home

**Next**

- Enter the key billing information:
  - **Due next on:** The next due date for that bill Quicken will base its future reminders on that date. use the **Change** link to make further adjustments, such as changing **How often** the bill comes due (such as quarterly or annually) and setting an **End date** for reminders if the bill is temporary.

Frequency	Explanation
Weekly	The transaction repeats every [n] 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.

- **Amount Due:** This is the amount you expect to pay every month. If the **Amount Due** will change over time either put in your best approximation or, click **Optional Settings** and edit the **Estimate amount for me** settings. See step six.
- **Account:** Choose the bank account you expect the money to be withdrawn from.

5. Click inside the **Details** panel to enter or change any details (**Category**, **Tag**, **Memo**). The split transaction option is available for **Category**.

**Category:** Auto & Transport:Auto Insurance

**Tag:** no tag

**Memo:** GEICO TYPE PREM COLL ID 353007 [click to edit](#) SO ACH

6. Add or edit the **Optional Settings** for the reminder.

#### Optional Settings

Remind me 3 days in advance [\(change\)](#)

☐ Sync to Outlook

Related website [\(add\)](#)

☐ Print check with Quicken

Estimate amount for me: OFF [\(change\)](#)

- **Remind me [n] days in advance**

- **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.

- **Estimate amount for me**

If your payments vary, Quicken can estimate an amount to use for the reminder when it is due. Select one of the following:

- **Fixed amount.** Turn off this feature. Quicken will always use the same amount for the reminder.

- **Previous payments.** Calculate an average amount for the reminder, based on your last [n] payments.

- **Time of year.** Use the same amount as last year for the reminder. This is great for utility bills or other reminders that have seasonal variations.

- **Credit card balance.** Use the balance of the selected credit card as the amount for the reminder.

If you decide to use this feature, an edit icon displays next to the amount in the reminder dialog. Click the edit icon to make further changes, as necessary. Note that this feature is not available for invoice reminders.

- **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.

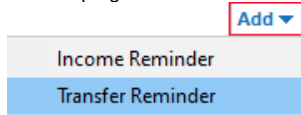
- **Make this a repeating online payment.**

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

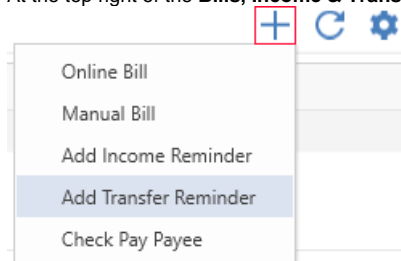
7. Click **Done**. Your reminder will be added.

## Create a Transfer Reminder

1. Click the **Bills & Income** tab.
2. Be sure you are either in the **Income & Transfers** tab or (if you have combined tabs) are in the **Bills, Income & Transfers** tab.
3. Depending on your tab, you'll have different options for adding a **Transfer Reminder**.
  - At the top right of the **Income & Transfers** screen select **Add Transfer Reminder**.



- At the top right of the **Bills, Income & Transfers** screen select the plus sign, then **Add Transfer Reminder**.



4. Enter a short **Description** of the transfer such as *Vacation Fund Transfer*.

A screenshot of a dialog box titled 'Add Transfer Reminder'. The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled 'Description' containing the text 'Vacation Fund Transfer'. Below the input field is a large empty rectangular area. At the bottom left of the dialog is a question mark icon and a 'Cancel' button. At the bottom right is a 'Next' button.

5. Select **Next**.
6. Enter the key transfer information:
  - **Due next on:** The next due date for that transfer. Quicken will base its future reminders on that date. Use the **Change** link to make further date adjustments, such as changing **How often** the transfer will occur and setting an **End date** for reminders if the transfer schedule is temporary.

Frequency	Explanation
Weekly	The transaction repeats every [n] 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.

- **Amount Due:** This is the amount you expect to transfer every time. If the **Amount Due** will change over time either put in your best approximation or, click **Optional Settings** and edit the **Estimate amount for me** settings. See step 8.
- **From Account:** Choose the bank account you want the money to be transferred from (the source of the funds). You will still need to make the transfer yourself, this is just a reminder.

- **To Account:** w
- Click inside the **Details** panel to enter or change any details (**Tag**, **Memo**).



- Add or edit the **Optional Settings** for the reminder.

#### Optional Settings

Remind me 3 days in advance ([change](#))

Related website ([add](#))

Estimate amount for me: OFF ([change](#))

☐ Sync to Outlook

☐ Print check with Quicken

- **Remind me [n] days in advance**

- **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.

- **Estimate amount for me**

If your payments vary, Quicken can estimate an amount to use for the reminder when it is due. Select one of the following:

- **Fixed amount.** Turn off this feature. Quicken will always use the same amount for the reminder.

- **Previous payments.** Calculate an average amount for the reminder, based on your last [n] transfers.

- **Time of year.** Use the same amount as last year for the reminder. This is great for utility bills or other reminders that have seasonal variations.

If you decide to use this feature, an edit icon displays next to the amount in the reminder dialog. Click the edit icon to make further changes, as necessary. Note that this feature is not available for invoice reminders.

- **Sync to Outlook**

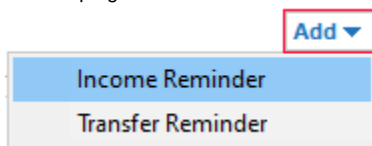
Select this option to add the reminder to your Microsoft Outlook calendar.

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

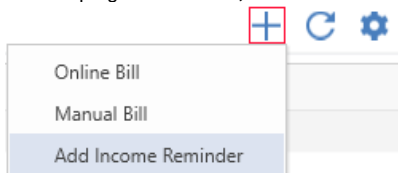
- Click **Done**. Your reminder will be added.

## Create an Income Reminder

- Click the **Bills & Income** tab.
- Be sure you are either in the **Income & Transfers** tab or (if you have combined tabs) are in the **Bills, Income & Transfers** tab.
- Depending on your tab, you'll have different options for adding an **Income Reminder**.
  - At the top right of the **Income & Transfers** screen select **Add Income Reminder**.



- At the top right of the **Bills, Income & Transfers** screen select the plus sign, then **Add Income Reminder**.



4. In the **From** field enter the name you want to use for your income source. You can also choose from existing payees.

**Add Income Reminder**

From:

[?](#) [Cancel](#) To track your payroll taxes and deductions, use the [Paycheck Setup wizard](#). [Next](#)

5. Select **Next**.

6. Enter the key income information:

- **Due next on:** The next due date for that income Quicken will base its future reminders on that date. use the **Change** link to make further adjustments, such as changing **How often** the income is planned for and setting an **End date** for reminders if the income schedule is temporary.

Frequency	Explanation
Weekly	The transaction repeats every [n] 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.

- **Amount Due:** This is the amount you expect to receive every time. If the **Amount Due** will change over time either put in your best approximation or, click **Optional Settings** and edit the **Estimate amount for me** settings. See step 8.
- **Account:** Choose the bank account you expect the income to be added to.

7. Click inside the **Details** panel to enter or change any details (**Category**, **Tag**, **Memo**). The split transaction option is available for **Category**.

[+](#) **Add category, tag or memo**

[click to edit](#)

8. Add or edit the **Optional Settings** for the reminder.

#### Optional Settings

Remind me 3 days in advance [\(change\)](#)

Related website [\(add\)](#)

Estimate amount for me: OFF [\(change\)](#)

☐ Sync to Outlook

☐ Print check with Quicken

- Remind me [n] days in advance

- 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 payee or financial institution. This is linked to in the Web column of the [Manage Bill & Income Reminders](#) list.

- **Estimate amount for me**

If your payments vary, Quicken can estimate an amount to use for the reminder when it is due. Select one of the following:

- **Fixed amount.** Turn off this feature. Quicken will always use the same amount for the reminder.
- **Previous payments.** Calculate an average amount for the reminder, based on your last [n] payments.
- **Time of year.** Use the same amount as last year for the reminder. This is great for utility bills or other reminders that have seasonal variations.

If you decide to use this feature, an edit icon displays next to the amount in the reminder dialog. Click the edit icon to make further changes, as necessary. Note that this feature is not available for invoice reminders.

- **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](#).

9. Click **Done**. Your reminder will be added.

For more information, see:

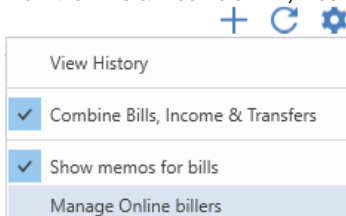
- [How do I change or add a loan reminder?](#)
- [The Bills tab](#)
- [Using bill reminders](#)
- [Projecting cash flow and account balances](#)

## Delete Manual Reminders

1. Go to **Tools** menu > **Manage Bill and Income Reminders**. You can also press **Ctrl+J**.
2. On the **Bills & Income Reminders** screen, Select the reminder you want to delete.
3. On the **Bills and Income Reminders** menu, select **Delete**.
4. Click **OK**. The reminder will be deleted.

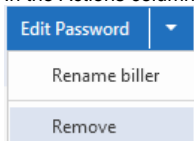
## Delete Online Bill Reminders

1. From the **Bills & Income** or **Bill, Income, & Transfers** screen, select the gear icon **Manage Online billers**.



The Manage Online Bills screen will appear.

2. In the Actions column, select the down arrow, then choose **Remove**.

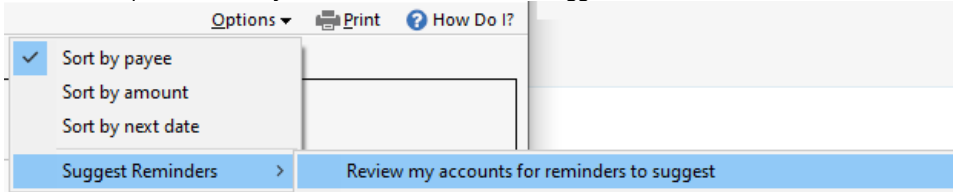


The biller will no longer appear on the **Bills & Income** or **Bill, Income, & Transfers** screen

## Turn off reminder suggestions

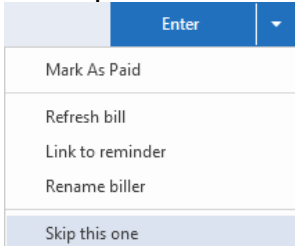
1. Go to **Tools** menu **Manage Bill and Income Reminders** or press **Ctrl+J**.

2. On the **Bill and Income Reminders** screen, select **Options** menu **Suggest Reminders**.
3. Uncheck the option **Review my accounts for reminders to suggest**.



## Skip a reminder

1. Go to the **Bills** screen.
2. In the action column, select the down arrow.
3. Select **Skip this one**.



The bill reminder will now display to the next scheduled payment after the payment you chose to skip.

### Do bill reminders work the same way for investment accounts?

You can pay bills online from within your Quicken investment account if you sign up and activate your investment account for [Quicken Bill Manager](#). You can then create a bill reminder from your investment account, or set up a repeating online payment series for any of your regular cash transactions.

Use the Manage Bill & Income Reminders dialog to set up recurring dividend and interest transactions for investment accounts. For other recurring investment transactions (for example, dollar cost averaging, DRIPs, or other transactions that involve purchases on a regular basis), set up a [memorized investment transaction](#) and then assign it to the [Investment Scheduled Bills & Deposits group](#).

## More Information

- [Create a bill, income, or transfer reminder](#)
- [Change a bill or income reminder](#)
- [View your bill and income reminders](#)
- [Handle bill and income reminders that are due](#)
- [Project cash flow and work with reminders in a register](#)
- [Sync your Quicken reminders with Outlook](#)
- [Have Quicken check for recurring bills](#)