About Quick Pay

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Quick Pay is a way to pay bills online through the Quicken application. The Quick Pay service sends payments electronically, transferring the money from your financial institution's account to your designated payee. Using Quicken, you can specify which financial institution you will use, designate the payee, track the payment, and confirm that the payment has been made.

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Quicken Bill Manager is used to display your upcoming bills (bill presentment) so that you can anticipate future payments and better manage your spending. As part of **Quicken Bill Manager**, you can use **Quick Pay** and **Check Pay** to send money to payees (pay your bills).

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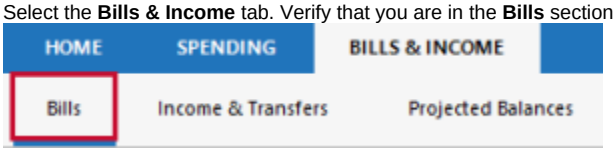
Check Pay makes mailing a check to anyone nationwide fast and easy. Once you have set up **Check Pay**, you can send payments by entering the payee's name, payee's address, and the payment amount into Quicken. Quicken takes care of printing, stuffing, and mailing a check drawn off of your checking account. It is easiest to set up **Check Pay** during the setup for **Quick Pay**.

> Quicken Bill Manager is designed to use your checking account, although it is also possible to use a savings account. You need to set up your account in Quicken before you can set up **Quick Pay** and **Check Pay**.

Adding an online bill

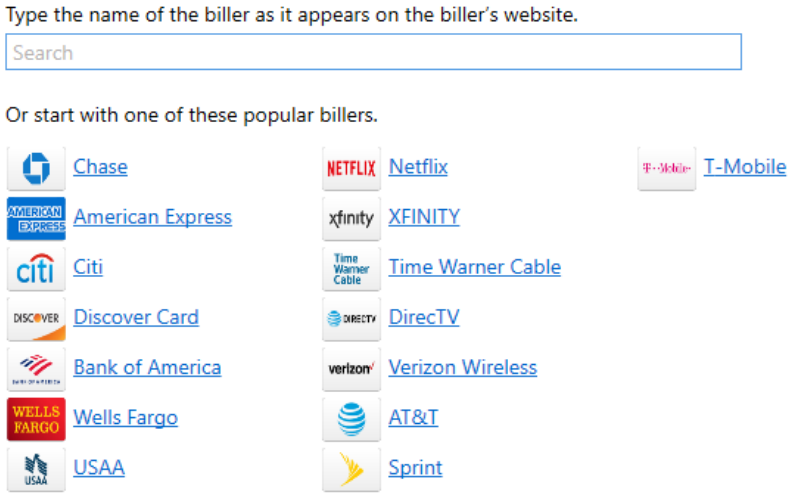
To set up **Quick Pay** and **Check Pay**, you will first need to add a bill. It is best to start with an **Online Bill**. If you have already added a bill, you can go directly to **Setting up Quick Pay and Check Pay**.

1. Select the **Bills & Income** tab. Verify that you are in the **Bills** section under the **Bills & Income** tab.

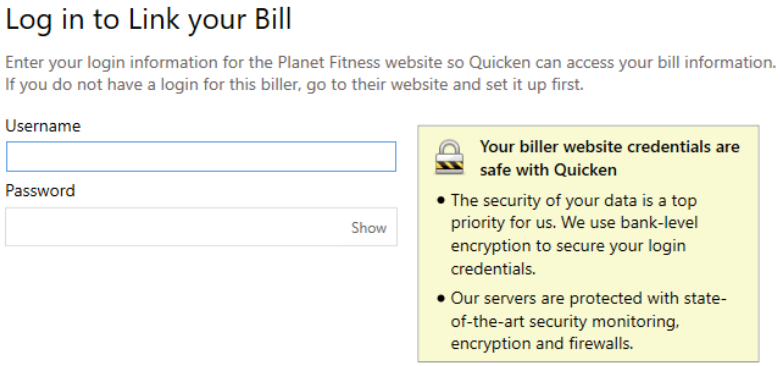


2. In the upper right corner of the **Bills** section, select +.

3. Select **Online Bill**.
4. Type in or select the name of your online biller.



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



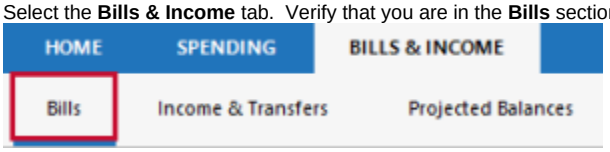
> If an error occurs, check your login info and try again. You may want to log in to the payee's web site, just to be sure it accepts your information.

6. Click **Done** when complete. Your bill is now linked, which means you can pay it through Quicken. The linked bill will appear on your **Bills & Income** page. Once you have at least one online account, see the next topic, **Setting up Quick Pay and Check Pay.**

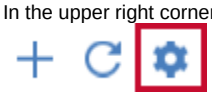
Setting up Quick Pay and Check Pay

Once you have added a bill, you can begin the process of setting up **Quick Pay** and **Check Pay**.

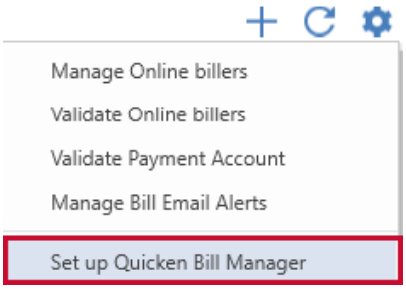
1. Select the **Bills & Income** tab. Verify that you are in the **Bills** section under the **Bills & Income** tab.



2. In the upper right corner of the **Bills** section, select the gear icon.



3. Select **Set up Quicken Bill Manager**.



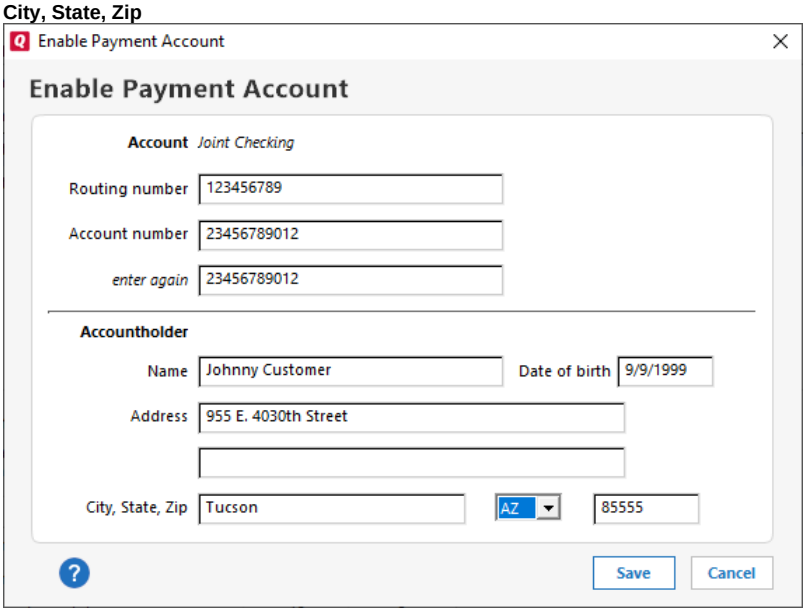
> If you have already set up one or more accounts with Quicken Bill Manager, select **Payment Accounts.**

4. Review any instructions and the **Acknowledgment**.
5. Choose an account from the list of **Payment Accounts** and select **Enable.**

Available Accounts	Enabled for Quick Pay	Enabled for Check Pay	
Jennifer Checking	No	No	Enable
Jennifer Savings	No	No	
Joint Checking	No	No	
Joint Savings	No	No	

6. Enter the following information about your payment account. You may need to consult your bank to get the appropriate information.

- **Routing number**
- **Account number**
- **Name**
- **Date of birth**
- **Address** (The address you have listed with your bank)
- **City, State, Zip**



> Be sure your financial institution has your correct address information. People sometimes forget to update their address when they move.

7. Select **Save**.
8. The screen to enable **Check Pay** will appear. To enable **Check Pay** select **Begin Verification**. If you do not want to enable **Check Pay**, click **Don**
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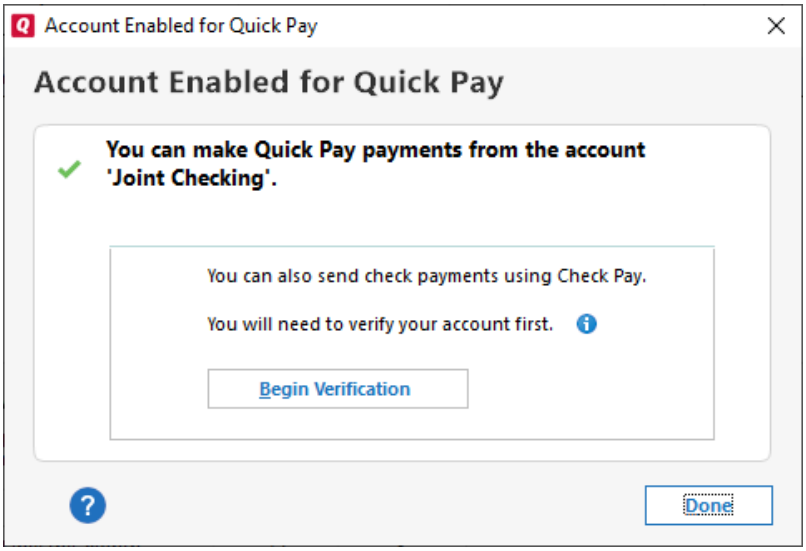
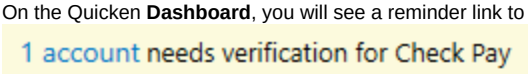


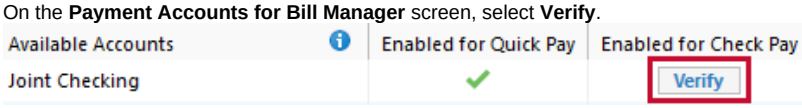
9. Read through the screens telling you about **Check Pay**, then click **Done**.

> Two small deposits (also called micro-deposits) between $0.01–$0.99 will be deposited into your checking account in 1–3 business days from **SP -Quicken**. In the next step, you'll need to enter these amounts to verify your account ownership. You can check your online bank account, or wait for the deposits to appear in the register.

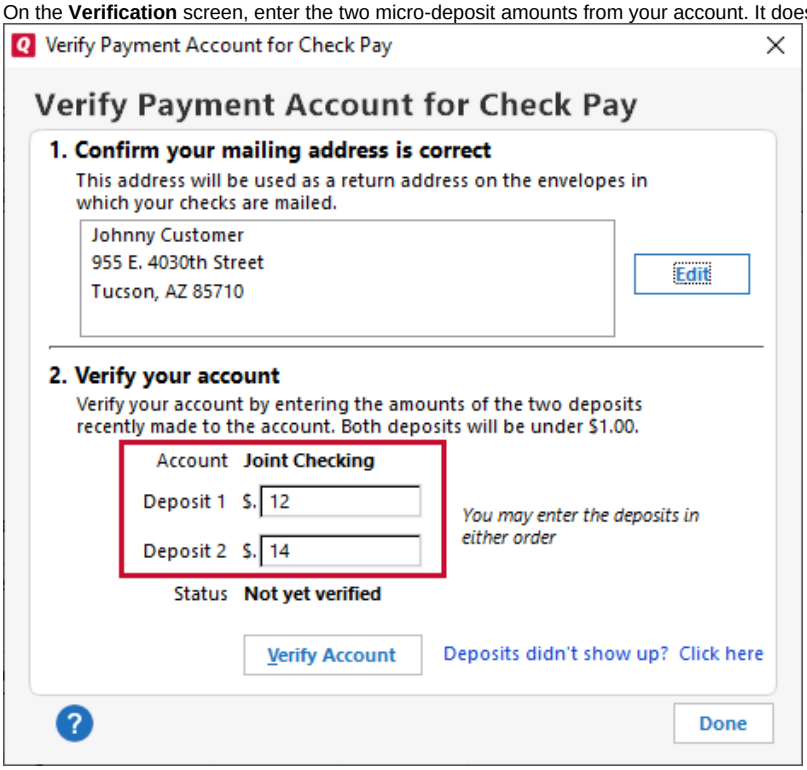
10. On the Quicken **Dashboard**, you will see a reminder link to verify your account such as **Account needs verification for Check Pay**.



11. On the **Payment Accounts for Bill Manager** screen, select **Verify**.



12. On the **Verification** screen, enter the two micro-deposit amounts from your account. It does not matter what order you enter them in.



13. Select Verify Account.
14. The **Payment Accounts for Bill Manager** screen will reappear. You will see a check mark under **Enabled** for **Check Pay**. Select **Done**. You can now use both **Quick Pay** and **Check Pay** through Quicken.

For more information about **Quick Pay**, see About Quick Pay.

For more information about Check Pay, see About Check Pay.

> You need to set up **Quick Pay** before you can make a **Quick Pay** payment.

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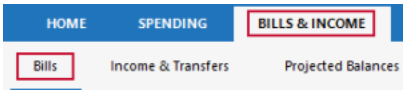
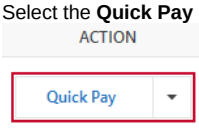
Making a payment using Quick Pay from the Bills tab

1. Select the **Bills & Income** **Bills** tab.



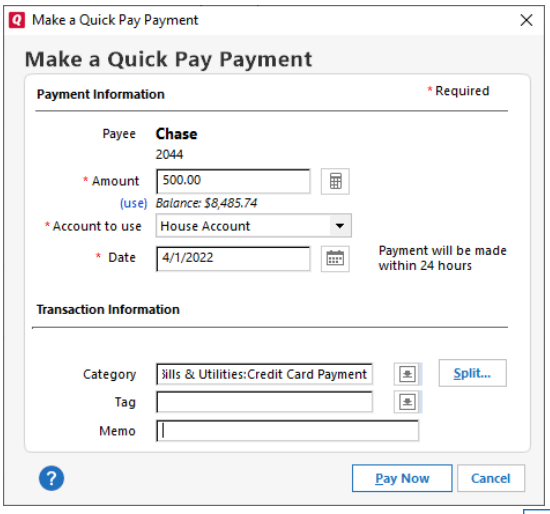
2. Select the **Quick Pay** button in the **Action** column for the bill you want to pay.



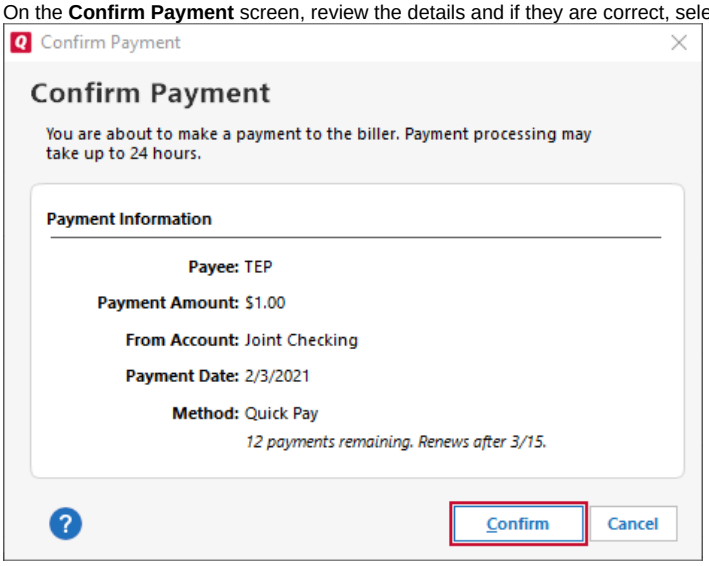
3. On the **Make a Quick Pay Payment** screen, enter the **Amount**, **Account to use**, and payment **Date**. You can optionally enter a **Category**, **Tag**, and **Memo** for your payment.

   To make a Quick Pay payment to your online biller you will need to provide a few details to help the system make a payment on your behalf.

   - **Amount**: By default we will display the amount of the bill, but you have the flexibility to pay a different amount. For a credit card bill, you will have the minimum amount, total amount due, and a choice to pay any amount between those two amounts. Some billers will not allow you to pay more than the amount due.
   - **Account to use**: Any account that is enabled for Quick Pay payments.
   - **Date**: Quicken allows you to either pay a bill immediately or to schedule that bill to be paid later. The payment date will default to today's date. **If you want to make your payment immediately, leave the date set to the default. The payment will be made as soon as possible, usually within minutes.** If you want to schedule a payment, pick a future day on which you want the bill to be paid. In most cases you can schedule a bill up to 45 days in advance. We recommend you schedule your payment no later than a day or two prior to the due date to allow recovery from any possible payment issues prior to the due date to avoid late fees or penalties.
     Note: Some billers will only allow same day payments.
   - **Category**, **Tag**, and **Memo** fields. These will help Quicken to create better reports on your payments and transactions.



4. If you have selected a future date for your payment, select Schedule. if you are using today's date, select Pay Now.
5. On the **Confirm Payment** screen, review the details and if they are correct, select **Confirm**. You can also **Cancel**.



> If you choose to **Schedule** a payment, that payment will appear immediately in your register marked as **Scheduled**. The status will change to **Paid** once the bill is paid or **Failed** if the bill could not be paid. You can also see your scheduled payments in **Calendar** view.
>
> You can cancel a payment prior to the payment date if you want to make changes to the payment amount/date/account or to pay via another payment method.

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You will be presented with a summary of your payment so you can review the payment before sending it to process. This double confirmation helps you to avoid any unwanted errors. This also provides you a chance to cancel the payment before the actual transaction is recorded in the register. After confirming from this screen, you might still be able to cancel the payment, but the amount of time available varies from biller to biller.

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To know more about your last payment, you need to select the link under the **Last Payment** column. After you select this link, you will see the details of the payment and the stage that the payment is in. There are four stages for a bill:

- Processing
- Paid
- Canceled
- Failed

If the payment is still in the processing state, you may be able to cancel the payment if there is an issue. In the details, you can also view the reason for any failure in the payment flow.

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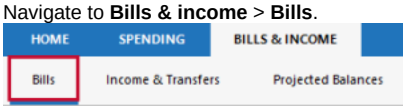
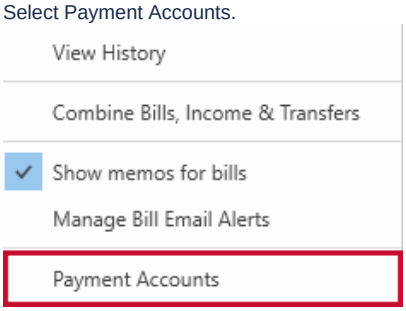
To edit a payment account:

1. Navigate to **Bills & income** > **Bills**.



2. In the upper right corner of the **Bills** section, select the gear icon.

3. Select Payment Accounts.



4. Choose the **Payment Account** you want to update and select **Edit**.

> If you want to add Quick Pay or Check Pay to an existing payment account, click **Enable** instead of edit and see Setting up Quicken Bill Manager with Quick Pay and Check Pay.

5. On the Edit Payment Account Screen, make your changes. You can change the:
   - **Routing number**
   - **Account number**
   - **Name** (Account Holder)
   - **Date of Birth**
   - **Address**
6. Select **Save**.