How do I project cash flow and work with reminders in a register?

Quicken now lets you display your reminders directly in an account register. This allows you to simply look at the Balance column in a register to see the affect your reminders will have on future cash flow in the account. You can control how far in advance to display the reminders, and at any time you can choose to remove them without affecting your existing register transactions.

Many customers have asked for this feature. We hope you find it useful and the easiest way yet to work with your reminders.

Get started with register reminders

1. If you haven't done so already, create reminders for your bills and income.
2. Open the register of the account you selected when you set up the reminders. This is usually your primary checking account.
3. Click ⏰ ▼ (the Register Reminders icon) and set how far in advance to display the reminders. If you decide later that you want to remove the reminders from your register, select **None**.
4. For each reminder in the register (they are tan colored), choose what you want to do:
   - **Enter this reminder**

     Click Enter this reminder to add the selected reminder to the register. This is necessary because a reminder that displays in your register is there to remind you of an upcoming transaction and help you project your cash flow. A reminder is not an actual register transaction until you enter it.

     After you click Enter this reminder you will have the opportunity to make changes, for example to the amount, as it is being entered.

     - **Why don't I see this option?**

       Enter this reminder is not available:

       - If you told Quicken to Automatically Enter a reminder into the register when you set it up. In this case, you're done. The reminder has already been entered.
       - If you selected a reminder that is not the next reminder due. Reminders must be entered into the register in the order in which they are due.
   - **Skip this one**
     Click **Skip this one** to remove the selected reminder from the register, but leave any future reminders unaffected. If you want to remove all instances of a reminder, choose Delete this instance and all future instances instead.
     - **Why don't I see this option?**

       Skip this one is not available if you have selected a reminder that is not the next reminder due. Reminders must be entered into the register in the order in which they are due.
   - **Edit this instance**
     Click **Edit this instance** to change how the selected reminder is set up. For example, you might want to change when it's due, or the method of delivery.
   - **Edit this instance and all future instances**
     Click **Edit this instance** and all future instances to change how the selected reminder, and all future reminders, are set up. For example, you might want to change the account the reminder is linked to, or the category that's assigned to it.
   - **Delete this instance and all future instances**
     Click **Delete this instance** and all future instances to remove the selected reminder from the register, and delete the reminder from Quicken so that it never appears again.

Each reminder has an icon that tells you something about when it's due. Just click the icon to see your options.

Icon	Meaning
⏰ Upcoming	A reminder is "upcoming" when the number of days until its due date exceeds the "Remind me [n] days in advance" setting. Click the icon for options.
🕐 Due	A reminder is "due" when the number of days until its due date falls withinthe "Remind me [n] days in advance" setting. Click the icon for options.
🕐 Overdue	A reminder is "overdue" when its due date has past. Click the icon for options.

See Status column icons to learn about other icons you may see in the register.
Select a reminder, click its icon, and then choose one of the following options:

- **Enter this reminder**

  Click **Enter this reminde**r to add the selected reminder to the register. This is necessary because a reminder that displays in your register is there to remind you of an upcoming transaction and help you project your cash flow. A reminder is not an actual register transaction until you enter it.

  After you click **Enter this reminder** you will have the opportunity to make changes, for example to the amount, as it is being entered.

- **Why don't I see this option?**

  Enter this reminder is not available:

    - If you told Quicken to Automatically Enter a reminder into the register when you set it up. In this case, you're done. The reminder has already been entered.
    - If you selected a reminder that is not the next reminder due. Reminders must be entered into the register in the order in which they are due.
- **Skip this one** Click **Skip** this one to remove the selected reminder from the register, but leave any future reminders unaffected. If you want to remove all instances of a reminder, choose Delete this instance and all future instances instead.
    - **Why don't I see this option?**

      Skip this one is not available if you have selected a reminder that is not the next reminder due. Reminders must be entered into the register in the order in which they are due.
- **Edit this instance**
  Click **Edit this instance** to change how the selected reminder is set up. For example, you might want to change when it's due, or the method of delivery.
- **Edit this instance and all future instances**
  Click **Edit this instance** and all future instances to change how the selected reminder, and all future reminders, are set up. For example, you might want to change the account the reminder is linked to, or the category that's assigned to it.
- **Delete this instance and all future instances**
  Click **Delete this instance** and all future instances to remove the selected reminder from the register, and delete the reminder from Quicken so that it never appears again.

You can link your reminders to online billers so that you can get the latest bill details within Quicken. On this page, link your reminder to a biller as below:

1. Select the required reminder.
2. In the **Linked to Biller** column, click **Link it Now**.
3. Search and select the required online biller.
4. Enter the credentials you use to sign into the biller website.
5. Click **Next**. After the biller is successfully added, click **Close**.

If a reminder is linked to a biller, the biller name is displayed in the **Linked to Biller** column. You can unlink your reminder from the biller if you decide that you no longer want them linked or you think you linked to a wrong biller. Right-click the required bill and select **Unlink from biller**.

Additional information

- The Bills tab
- Using bill reminders
- Paying bills in Quicken
- Projecting cash flow and account balances