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.

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 **Online Bill**.

+	С	\$
Online Bill		
Manual 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.

Chase	NETFLIX	Netflix	Ŧ+-Mobile-	<u>T-Mobile</u>
American Express	xfinity	<u>XFINITY</u>		
citi Citi	Time Warner Cable	Time Warner Cable		
DISCOVER Discover Card	🈂 DIRECTV	DirecTV		
Bank of America	verizon	Verizon Wireless		
WELLS FARGO Wells Fargo	9	<u>AT&T</u>		
USAA USAA	>	Sprint		

4. 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.

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

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

Create a Manual Bill Reminder

- 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 Manual Bill.

	+	\mathbf{C}	\$
Online Bill			
Manual Bill			

3. 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.

Pay t	o Ge <mark>ico</mark>		Ŧ		
	Burger King	-4.75		762810 BURGE	,
	Burger Lounge	-54.00		Loan Advance	
	Checking Avalon Bagels	-40.96		Visa Checking	
	Checking Eegees Date	-6.16		Visa Checking	
	Checking Eegees Speedw	-7.90		Visa Checking	
	Dollar General	-21.28	Shopping	767421 DOLLA	
	Geico	-166.00	Auto & Trans	GEICO TYPE PR	
	Graze Premium Burgers	-44.77		Visa Checking	
	Graze Premuim Burgers	-18.37			
	In-n-out Burger	-17.50	Food & Dining	Visa Checking I	
	In-n-out Burger	-6.08		Visa Checking I	
	Interest Charge	-44.32	Interest Exp		
	Massage Envy	-48.00	Personal Care	Visa Checking	
	Pennymac Mortgage	-1,830.00	Home:Mortg	PENNYMAC TYP	
	Public Storage	-301.62	Home	Visa Checking	٩

4. 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 CO ACH

- 6. 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)

- 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.

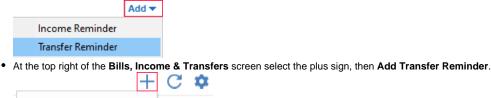
• Make this a repeating online payment.

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.



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Online Bill	
Manual Bill	
Add Income Reminder	
Add Transfer Reminder	
Check Pay Payee	

Sync to Outlook

Print check with Quicken

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

Q Ad	d Transfer Reminder			×
Ad	d Transfer R	eminder		
	Description	Vacation Fund Transfer	ŧ	
?	Cancel			Next

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
- 7. Click inside the Details panel to enter or change any details (Tag, Memo).



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

Optional Settings	
Remind me 3 days in advance	(change)
Pelated website (add)	

Sync to Outlook

Related website (add)

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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:

- $^\circ~$ 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.

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

Manual Bill

Add Income Reminder

Create an Income 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 an **Income Reminder**.
 - At the top right of the Income & Transfers screen select Add Income Reminder.

	Add 🔻	r -							
	Income Reminder								
	Transfer Reminder								
•	At the top right of the Bills, Income & T	ransf	fers sc	creen s	elect the	e plus sig	n, then A	dd Incon	ıe
	Online Bill	-							

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

Q Add Income Reminder	×		
Add Income Reminder			
From Employer 🔳			
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	
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

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