


Using the account register

 **Are you having issues with your register or accounts?**
You may want to look at [this support article](#). You can also [contact support directly](#).

The Quicken register records all your financial transactions, much like a traditional checkbook register. It includes checks, deposits, and electronic transactions, which you can enter manually or download from your bank.

Purpose and Functionality

The register helps keep track of all financial activity in an account, showing transactions by date, who the payment was for (payee), what it was for (category), and the amount. This makes it easier to manage your finances and see where your money is going.











Benefits of Using the Register



Using the Quicken register helps ensure that all your transactions are recorded, reducing errors and providing a dependable record for managing your money. It also makes it easy to update and reconcile your accounts with your bank's records, keeping everything consistent.

The Quicken register is vital for managing your finances effectively, giving you the tools to track, analyze, and control your spending and savings.


Elements of the Quicken Register

The Quicken register provides a detailed record of all transactions associated with your financial account. Below are the default columns.

	Date	Check #	Payee	Memo	Cate...	Tag		Payment	Clr	Deposit	Amount	Balance	
	10/19/2023		ADM		Net Salar					4,890 00	4,890 00	78,910 00	
	10/12/2023		AAA Real		Home:Re			2,300 00			-2,300 00	74,020 00	
	9/19/2023		ADM		Net Salar					4,890 00	4,890 00	76,320 00	
	9/19/2023		ADM		Net Salar					4,890 00	4,890 00	71,430 00	
	1/1/2023		Opening		[Checkin				R	5,000 00	5,000 00	5,000 00	
	4/15/2024		Check #	Payee	Memo	Categ...	Tag		Payment		Deposit	Amount	  

- Flags**  : You can mark transactions with flags for easy identification or to highlight them for further action. Flags serve as visual cues to quickly locate specific entries.
- Date**: This column records the date of each transaction, organizing the entries chronologically and aiding in tracking when transactions occurred.
- Check Number (Check #)**: If the transaction involves a check, this field records its number. Tracking check numbers is crucial for managing payments and reconciling the register with your bank statements.
- Payee**: The payee column shows the name of the individual or entity involved in the transaction, helping you to identify where payments went or who made a deposit.
- Memo**: This field allows for adding optional notes or details about the transaction, useful for providing additional context like the purpose of a payment or the details of a receipt.
- Category**: Transactions are classified into categories such as entertainment, home, or shopping. Categorizing helps in budgeting and financial analysis by showing how money is spent or accumulated.
- Tag**: Similar to categories, tags offer another layer of sorting and organizing transactions. Tags can be used for more granular management of your financial records, such as tracking project expenses or personal versus business expenditures.
- Attachments**  : You can attach documents related to the transaction, such as receipts, invoices, or warranties. Attachments help keep all relevant financial documentation linked directly to the corresponding entries.
- Payment**: This column shows the amount of money paid out in a transaction.
- Clr (Cleared)**: This status indicator shows whether the transaction has been cleared or reconciled with the bank, helping to ensure the register matches your actual bank transactions.
- Deposit**: This column reflects the amount of money received in a transaction.
- Amount**: This combines the values of payments and deposits to show the total amount involved in the transaction, providing a straightforward view of the financial impact.
- Balance**: After each transaction, this column updates to show the current total in the account. It provides a running balance that reflects your account's financial status after each recorded entry.

Change the columns that display in the register

- Display the register that you want to change.
- At the top of the register scrollbar, click the  icon.
- Select the columns that you want to display in the register.

Notes

- This feature is available in non-investment registers only.
- Each non-investment register can have its own column settings.

- The columns available to choose from change based on account type, and one- or two-line display status.
- Learn more about [changing the columns that display in a register](#).

Additional Columns

Additional columns you can add to your register include:

- **Expensed:** Tracks whether a transaction has been expensed in reports.
- **Notes:** Provides a space for additional notes that do not fit in the memo field.
- **Taxed Line Item:** Indicates if a transaction line item is subject to taxes.
- **Tax-related:** Marks transactions as related to tax matters, aiding in tax preparation and reporting.

By adjusting these settings, you can tailor the register to better manage and analyze your financial information.