Working with scheduled transactions

Chances are your bills don't all arrive on the same day. Instead, 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, and then you can pay the bill the way you usually do: with a check, an online payment, or a direct withdrawal.

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

> **Reminders**
>
> While it is possible to schedule a payment for online accounts you download transactions for, most people use this feature with an account they update manually. You may prefer to use **reminders** instead of scheduled transactions.

To schedule a transaction

1. On the sidebar, select the account you want to schedule a transaction for, such as your checking account.
2. In the register, enter your new transaction. For the **Date**, select the anticipated date of the transaction. You can always change it later if it gets paid on a different date.
3. Enter the other relevant information (**Payee**, **Category**, **Amount**, etc.).
4. Press **Enter**.
   The transaction will now appear in your register. It will be separated from completed transactions by a blue line. It will also be listed as **Uncleared**. If you use an online banking account, update the transaction once it's paid.

Delete a scheduled transaction

You delete a scheduled transaction the same way you delete any transaction.

1. On the sidebar, select the account you want to edit a scheduled transaction for, such as your checking account.
2. In the register, right-click the scheduled transaction you want to edit.
3. Select **Delete**.
4. Select **Yes** when asked to confirm that you wish to delete the transaction.

Edit a scheduled transaction

You edit a scheduled transaction the same way you edit any scheduled transaction.

1. On the sidebar, select the account you want to edit a scheduled transaction for, such as your checking account.
2. In the register, click the column in the scheduled transaction that you want to edit.
3. Make the desired change.
4. Press **Enter**.

> **What if I want to change the billing address or other information about the payee?**
>
> To change payee information:
>
> 1. Go to **Tools** menu **Memorized Payee List** (Ctrl + T).
> 2. Select the payee you want to edit.
> 3. Select the **Edit** button on the right side of the payee entry.
> 4. Change the information you want to change (**Address, Type of transaction, Category, Tag, Memo**).
> 5. Select **OK**.