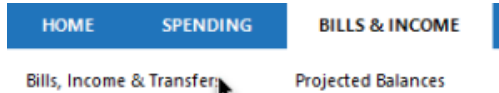


Modifying Bill or Income Reminders

Adjusting the details of your bill or income reminders in Quicken ensures you stay on top of your financial obligations and incoming funds. This could involve changing the advance notification period or editing the amount due.

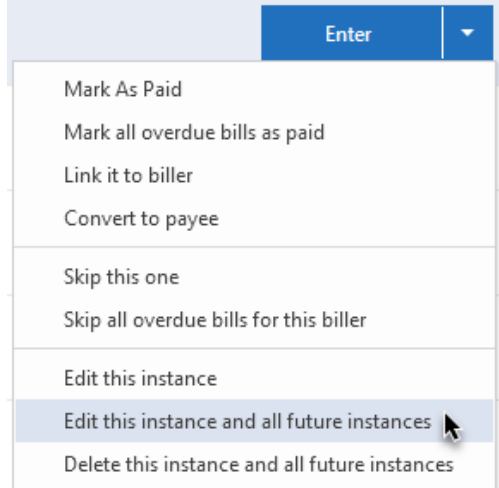
Editing a Reminder:

1. **Access Reminders:** Open the **Bills & Income** tab. If your tabs are combined, you'll find this under **Bills Income & Transfers**.



- a. **Find Your Reminder:** Locate the specific reminder you wish to modify. Expand the reminder's options using the down arrow and select either:

- **Edit this instance and all future instances** for comprehensive future changes.



- **Edit this instance only** if you're adjusting just the next occurrence.
3. **Update Reminder Details:** Revise any of the following as needed:
 - **Pay To:** Name of the biller.
 - **Due Next On:** Deadline for the next payment. Use the **Change** option for adjustments, including frequency changes (e.g., monthly to quarterly).
 - **Amount Due:** The payable amount.
 - **From Account:** The account from which the bill will be paid.

Optional Settings:

- **Advance Reminder:** Set how many days before the due date you wish to be reminded.
- **Related Website:** Enter the biller's website URL.
- **Estimate Amount:** Opt to estimate the bill based on past payments or seasonal variations.
- **Link to Online Bill:** Connect the reminder to the biller's online account for automatic updates.
- **Sync to Outlook:** Display reminders on your Outlook calendar.
- **Print Check with Quicken:** Print checks directly from Quicken for payment.

Additional details

1. To add a category tag or memo, click in the details section, make changes, and confirm by clicking **OK**.

Edit Reminder Instance

Mortgage Payment

Amount: 800.00 This change will be applied only to this reminder. All future reminders will keep your original Reminders Settings.

Due date: 9/22/2021

Details

Category: Split

Tag: no tag

Memo: For Kingways Residence

See if you can link this reminder to an online bill
Once you link to an online bill, the due dates and amounts will update automatically in Quicken during a One Step Update.

Link it Now

Save Cancel

Edit Reminder Instance

Mortgage Payment

Amount: 800.00 This change will be applied only to this reminder. All future reminders will keep your original Reminders Settings.

Due date: 9/22/2021

Details

Category: --Split--

Tag: --Split--

Memo: For Kingways Residence

OK Cancel

See if you can link this reminder to an online bill
Once you link to an online bill, the due dates and amounts will update automatically in Quicken during a One Step Update.

Link it Now

Save Cancel

- a.
2. **Save Changes:** Click **Save** or **Done** to finalize the edits.

Deleting a Reminder:

1. Navigate to **Tools > Manage Bill and Income Reminders**.
2. Select the reminder to be deleted and choose **Delete** from the menu.

Enter Ignore Add Edit Delete

Monthly Bills & Deposits All Bills & Deposits

Show graph

Status	Due	Pay To / Receive From
Upcoming	12/4/2021	Southwest Gas
Upcoming	12/5/2021	Tep Corporate De Typ

- 3.
4. Confirm deletion by clicking **OK**.

Disabling Reminder Suggestions:

1. Go to **Tools > Manage Bill and Income Reminders**.
2. Open the **Options** menu and select **Suggest Reminders**.
3. Disable the **Review my accounts for reminders to suggest** option.

Options Print How Do I?

Sort by payee

Sort by amount

Sort by next date

Suggest Reminders

Review my accounts for reminders to suggest

Suggest Reminders based on my past activity

Undo Reminders you have declined so they may be reconsidered.

Decline all suggested Reminders

Monthly Enter Edit Skip