

How do I set up a loan reminder?

Set up a Loan Reminder to have Quicken track your loan payment with your other bills on the Bills tab. Here's how:

- In the **Pay to** field, type the name of the lender. As you type, Quicken tries to find a match in the [Memorized Payee List](#). If Quicken finds a match, select the payee from the displayed list; if doesn't find a match, continue typing to create a new payee.
 - Edit the **Due Next On** date to match the date of your next loan payment.
 - Next to the **Amount due**, click (**Edit**) to change the loan payment amounts.
 - Select the **Account** from which you'll make the loan payment.
 - If you are making the loan payment from an account that's enabled for bill pay, select Use Online Bill Pay to pay the loan online.
 - **Tell me more**
Select this option to create an online payment for the loan reminder when it's entered into your register. Note that you'll still need to send it to your financial institution for processing before it can be paid. This is a good choice for amounts that vary over time because you can change the amount of each payment before sending it.
 - Add or edit the reminder **Details**.
 - **Category**
Categorize your loan payment. If you're using a detailed loan reminder, verify and assign categories to the other items included in the loan payment total.
 - **Tag**
[Tag your loan payment](#) to indicate where, to what, or to whom it applies.
 - **Memo**
You can display memo information in reports.
 - Add or edit the **Optional Settings** for the reminder.
 - **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.
 - **Related website**
Select this option to enter a Web address (URL) for the lender or financial institution. This is linked to in the Web column of the [Manage Bill & Income Reminders](#) list.
 - **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.

A repeating online payment is a series of online payments to a specific payee, for a set amount, on a schedule that you choose.

The repeating payment instruction is sent to an online bill pay service, such as Quicken Bill Pay or your financial institution, and they make payments on your behalf on the scheduled dates. You do not need to send the payment yourself each time it is due. This is a good choice for long-term payments of the same amount. Just be sure you keep enough money in your account to cover the payment when it is due.

This option is available only for accounts that are activated for online bill payment.

To activate online bill payment, choose **Tools** menu > **Account List**, click the **Edit** button next to the account to you want to activate, click the **Online Services** tab, and then click the **Set up now** button.