

Entering transactions

Manual Transactions

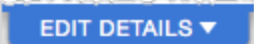
Even if you download transactions, you might still want to enter transactions by hand as well to keep your account up to date. The transactions from your bank, together with manually entered transactions, allow you to track the "real balance" for your account.

Bill & Income Scheduled Transactions

If you've set up Quicken to download transactions from your bank or other financial institution, you might never or only rarely need to enter transactions. But if you want Quicken to help you stay on top of upcoming bills, you will want to [schedule transactions](#).

Quicken can help you stay on top of the bills you have coming due to make sure you'll have enough money and don't forget to pay them on time. One of the primary tools to help you do this is scheduled transactions. Scheduled transactions are transactions you create for regularly occurring bills, like your electricity bill or your rent, and for regularly occurring income, like your paycheck. You create a scheduled transaction for each of these and specify when and how often it occurs. Quicken automatically creates new instances of the transactions into the future. The Stay on Top of Monthly Bills section of the Overview also displays all upcoming scheduled transactions you have due.


Enter a new manual transaction

1. Select an account in the sidebar.
2. Click the **New** icon in the register toolbar (or type **N**).
3. Enter information in as many fields in the transaction as you want to track. Recommended fields include:
 - **Date** - required. The date on which the transaction occurred.
 - **Payee or Merchant** - For example, the person or entity you transacted with "ABC Food", "Mike the Gardener", or your employer (for paychecks)
 - **Category** - **highly recommended**. Most Quicken features and reports use categories. (Note that downloaded transactions are auto-categorized, but you can change these auto-assigned categories to something different at any time. Quicken will remember this preference the next time you download.)
 - Don't see the column you need? Click the **Columns** icon in the Register Toolbar to choose the columns to display (or hide) in your register. For example, users of older versions of Quicken may want to remove the "Amount" columns and instead use the "Payment" and "Deposit" columns.
4.  You can also click the **Edit Details** button (in the middle of the register row) to expose more editing options such as the memo and tag fields (both of which can be added as columns) and the Splits and Attachments tab. Checking accounts will also have a **Check s tab** used for creating [printed checks](#).
 - You can [add attachments](#) such as receipts (photos, PDFs) to the transaction. If you use Quicken Mobile, you can also add receipts using your phone or tablet and the Quicken Mobile.
 - **Tag** - can also be useful for reporting. (Users of older versions of Quicken may have used "Classes." Tags work in a very similar manner.)
 - Splits are useful for applying multiple categories to a single transaction. [Learn more about splits.](#)
5. (Optional) Click **Save** to save the transaction.
 - You don't need to click **Save** to save the transaction—Quicken records the transaction automatically when you press **Enter**, move on to another task, or close the register.
 - Made a mistake? Choose **Edit > Undo** from the Quicken menu or type **Z**.

Enter a new bill or income reminder (scheduled transaction)

Scheduling your bill payments can save you time and help you remember to pay your bills when they're due. Many bills, such as rent and insurance payments, occur at regular intervals and are always for the same amount. Other bills occur less regularly, or the amount varies from month to month. Even regular bills don't come all at once—they trickle in. You can schedule all your bills, even if the amount varies. You can also schedule income and transfer transactions, such as paycheck deposits or monthly transfers from checking to savings.

After you schedule a transaction, Quicken enters it automatically in the register. Then you can print a check with Quicken, write a check by hand, or make a payment using your financial institution's website.

1. Select an account from the Accounts section of the sidebar.
2. Choose **Transactions > New Transaction**.
3. If necessary, tab to the Date field.
4. Select the checkbox labeled "Scheduled."
5. Enter how frequently the transaction occurs, the dates on which it occurs, when it starts, and when it ends.
 - Click the **Add** button to add any additional conditions. For example, if the transaction occurs on the first and third Friday of every month, enter: Every 1 month(s) on the 1st Friday. Then click the Add  button, and on the next row, enter: Every 1 month(s) on the 3rd Friday.
6. Enter the rest of the information about the transaction, including the payee, any categories or tags, and the amount.
7. (Optional) Click **Save** to save the transaction.
 - You don't need to click **Save** to save the transaction—Quicken records the transaction automatically when you press **Enter**, move on to another task, or close the register.
 - Made a mistake? Choose **Edit > Undo** from the Quicken menu or type **Z**.

Create a new bill or income reminder (scheduled transaction) that is based on an existing transaction.

If you already have an instance of a transaction that you want to schedule going forward—for example, a cable bill you paid in the past—you can streamline the process of creating a scheduled transaction.

1. Select the existing transaction you want to schedule.
2. Click **Schedule** in the toolbar.
 - Quicken creates a new transaction and populates it with the same Payee, Payment amount, Category, and Tag(s) as the existing transaction.
 - Change any values in the transaction as necessary
 - The register displays the next instance of a scheduled transaction. You might set up your water bill to be paid every month for the indefinite future, but the register only displays the next instance of that bill. This prevents the register from getting cluttered.
3. (Optional) Click **Save** to save the transaction.
 - You don't need to click **Save** to save the transaction—Quicken records the transaction automatically when you press **Enter**, move on to another task, or close the register.
 - Made a mistake? Choose **Edit > Undo** from the Quicken menu or type **Z**.

Bill and income reminders (Scheduled Transaction) and download matching

Scheduled transactions **are marked as paid automatically** when you download a transaction from your bank that matches a scheduled transaction in your register.

For example, let's say you have a scheduled transaction for your electricity bill. You scheduled it to be paid on the first Friday of every month. And let's say this is a bill that you pay via your bank's website. When Quicken downloads a transaction from your bank account that consists of a payment to your electricity company that took place around the beginning of the month, it automatically marks the scheduled transaction for your electricity bill for that month as paid.

If Quicken fails to recognize that a downloaded transaction matches a scheduled transaction, you can **match them manually** by dragging and dropping one onto the other.

Mark a Bill or Income Reminder (Scheduled Transaction) as paid or deposited

1. Select a scheduled transaction.
2. Control-click the transaction and choose **Mark as Paid** or **Mark as Deposited**.
 - You can also click **Paid** or **Deposited** in the toolbar.
 - Quicken enters the transaction as paid or deposited. The Scheduled icon disappears, and Quicken creates a new transaction for the next occurrence, if necessary.