

Status icons in your Quicken account register

This topic lists the different status icons that are displayed next to your transactions.

Transaction download status icons

Icon	Details
	The transaction is flagged for review. By default, all downloaded transactions are marked for review.
	The transaction was manually entered in your connected account register but is not yet matched with the downloaded transaction.
	The transaction, which has been entered manually, has been matched with a downloaded transaction.

Here are a couple of scenarios to explain the concept of matched and unmatched transactions:

- You entered a manual transaction in your account register (indicated by the icon ). Later, when a matching transaction is downloaded from your financial institution, the icon changes to .
- You entered a manual transaction in your account register (indicated by the icon ). Later, you downloaded the transaction from the financial institution. However, the icon does not change to . This could happen if the manual transaction is a check and is not yet cashed, or if the manual transaction does not match with any of the downloaded transactions.
- If you see the unmatched icon () and notice that it should have matched, you can drag-and-drop the transaction onto a downloaded transaction to manually match.
- If you see the matched icon () and you think it was matched incorrectly, click the icon and select **Unmatch**.

Schedule icons

These icons are associated with scheduled transaction that appear in your register.

Icon	Details
	Scheduled transaction. This transaction is scheduled to occur two or more days in the future.
	Due Today. This transaction is expected to be paid that day.
	Overdue. This transaction was scheduled for a previous date.

Marking transactions as reviewed

Your workflow will probably differ depending on whether the account you are working with is a connected account or a manual account. The icons work differently based on the connection type.

Connected Account

In a connected account, a blue dot appears for all downloaded transactions. An orange pencil icon turns blue when the transaction is matched with a downloaded transaction. After reviewing all of the downloaded transactions, it's easy to mark them as reviewed.

- If you want to mark transactions as reviewed after you look at each one, click on the blue icon and select **Reviewed**.
- If you have reviewed all of the newly downloaded transactions and want to mark all of them reviewed at once, click on the blue icon and select **Mark All Downloaded Transactions as Reviewed**. Note that this will not mark the orange pencils as reviewed, because you'll want to continue to see unmatched manually entered transactions so you can track them.
- If you have only reviewed a few of the downloaded transactions and want to mark only those transactions as reviewed, multi-select the reviewed transactions by using the standard Mac keyboard convention of holding down the **Shift** key to select a range of transactions or **Command** and clicking on different transactions individually. Once you have your selection, **Control + Click** (right-click) on any selected transaction and select **Set Status of Selected Transactions to > Reviewed** from the context menu.
- If you make a mistake, you can use the same methods above and select **Not Reviewed** on the transactions that need to be changed.

Manual Account

In a manual account, entering manually entered transactions won't display any icon by default.

1. If for some reason you want to flag a transaction, you can click in the column where the icons normally appear and then select **Flag for Review** from the menu that appears. This will turn on the orange pencil for this particular transaction, indicating that it needs to be reviewed.
2. In the past, Quicken used to display the orange pencil even in manual accounts and if you have an old account you may want to hide all of these icons. In this case, click on the orange pencil and select **Mark All Reviewed** from the menu that appears, to hide all of the pencils.

Bill Pay transaction status icons

Icon	Description in the Check # column	When you will see this.
		Shown when you are entering a non-Bill Pay transaction in an account that is enabled for Bill Pay.
	To send	Shown after you enter a Bill Pay transaction in your Quicken register, but have not yet sent the payment instructions to your financial institution.
	Sent (or check #)	Shown after you send the payment instruction to your financial institution; but before the financial institution has started to process the payment. When this icon is displayed you can still cancel this transaction. <i>Some financial institutions may provide a check number at this time. If provided, a check number is displayed in the Check # column, instead of the text Sent.</i>
	Paid (or check #)	Shown when the transaction is being processed by the financial institution but not yet matched with a downloaded transaction.
	Paid (or check #)	Shown when a previously sent Bill Pay transaction is matched to a downloaded transaction. (To remove the icon, click it and select Reviewed .)
	Void	Shown if you cancel a Bill Pay transaction. (You can delete the transaction if you wish.)
	Failed / Error	The transaction failed.
	Waiting	"Waiting" is displayed when Quicken sends a payment or cancellation request to your bank. If Quicken is unable to get a response from the bank, this label may persist. If this occurs, do an update to resend the response.