

How do I enter a transaction?



Unknown macro: 'mail-form'

Most of the time you'll update your spending accounts by downloading transactions and balances directly from your bank. Sometimes you'll need to enter transactions manually into your account register.

1. Open the account you want to use.
2. In the account register, find the new transaction line. Or you can go there directly by typing CTRL+N.
If you sort the register by a descending order of date, the latest transaction will appear on the top of the register. If you sort the register by an ascending order of date, the latest transaction will appear at the bottom of the register.
3. Change the date if necessary.
4. If this is a check, enter the check number in the Check # field.
5. In the **Payee** field, indicate who receives this payment or gives you this deposit.
6. In the **Payment** field or Deposit field, enter an amount.
7. Assign a **category** to the transaction.
8. In the **Tag** field, tag the transaction. (Optional)
9. In the **Memo** field, enter a note. (Optional)
10. Click the **Exp** field to [identify this transaction as a reimbursable expense](#). (Optional)
11. Click **Save**.

Notes

Tell me more about downloading transactions

To learn more how you can automate much of your transaction entry, see [Tell me about updating transactions and balances from my financial institutions](#).

Tell me more about what I see in the register

- Reconciled and cleared transactions are dimmed.
- Future transactions are displayed below a blue line (if the register is sorted by date).
- The transaction that you're currently working with has a pale blue background.
- As you work in a Quicken register, a number of different icons can appear in the Status column. See [Status column icons](#) to learn what they mean.

Tell me more about entering dates

- You don't have to type the slashes or the year, because Quicken has already entered the current year.
- To enter a date quickly, click the pop-up calendar at the right of the Date field, and then click a date.

Can I customize the Check # field?

The Check # field has several predefined transaction types; you can add customized types as well. To add a new type:

1. Click the drop-down arrow icon on the right side of the column cell.
2. Click Edit List.
3. Click New. Enter a name, click OK and Done.
4. To delete an item, select the item and click Delete.

My payee list is long and cluttered...what can I do?

If your payee drop-down list contains payees that you no longer need, [delete them](#) from the Memorized Payee List.

Tell me how to use the pop-up calculator to enter an amount

Click the calculator icon in any field in which you enter an amount; Quicken displays a pop-up calculator. Use the calculator buttons (or use the number keys in the top row of your keyboard) to calculate amounts, and then click Enter to place the amount in the field.

Tell me more about entering categories

The category drop-down list is divided into several groups such as Personal income, Personal expenses, Transfers, All Categories, and so on. Choose the group you want to work with, and then select the specific category.

Depending on your payee information, [Quicken may suggest a category](#).

To enter a transaction with multiple categories, click the **Split** button.

Can I transfer money between Quicken accounts?

Yes you can. When you transfer money between accounts, one account balance increases and the other account balance decreases—but your net worth remains the same. Quicken records a transfer in your "transfer from" account register and creates a parallel transaction in the "transfer to" account. For more information, see [Transfer money between accounts](#).

Can I customize my account register?

Yes. Each time you record a transaction, Quicken sorts it in the register—the default is to first sort by date and then by check number. You can also sort a register by clicking on a column heading. You can also change the appearance and behavior of a spending account register by changing [register options](#), [register preferences](#), and [QuickFill preferences](#).

Are there any columns I can't edit?

- Leave the **Clr** field blank. (This refers to whether the transaction has cleared during reconciliation.)
- You can't edit the **Amount** or **Balance** columns. Quicken calculates them automatically.

What do the Status column icons mean?

As you work in a Quicken register, a number of different icons can appear in the Status column. See [Status column icons](#) to learn what they mean.

Can I print my register?

You can print transactions from any of Quicken's registers for a specified range of dates. You can also choose whether to print details for split transactions. Transactions will print in the order in which you see them in the register. You can display them in a [different sort order](#) before printing.

What's the largest amount I can enter?

Amounts for single transactions are limited to \$99,999,999.99. Amounts for printed checks are limited to about \$14,000,000.00.

How are the inflow and outflow columns labeled in different types of registers?

Type of account	Inflow column	Outflow column
Checking accounts	Deposit	Payment
Credit card accounts	Payment (paying off your balance decreases the amount you owe)	Charge (charging items to your credit card increase the amount you owe)
Loan and other liability accounts	Decrease (diminishes the liability)	Increase (increases the amount you owe)
Asset accounts	Increase (add to the asset. value)	Decrease (diminishes the asset)

Can I copy transactions into other applications, such as Microsoft Word or Excel?

Yes. You can copy transactions from your spending account registers by holding down the Shift key, selecting a range of transactions to copy, and then choosing Edit menu > Transaction > Copy Transaction(s). Then you can switch to the other application and choose Edit menu > Paste. Note: Quicken split transaction information is not copied.

Print this topic