# How do I use a form to enter a transaction?

1. Enter basic information about the transaction's payee, category, tag, and memo.
    - **Tell me more about entering payee, category, tag, and memo information**
      In the Payee field, indicate who receives this payment or gives you this deposit.

        - **More about entering payees**
          If your payee drop-down list contains payees that you no longer need, you can delete them from the **Memorized Payee** List.

      Categorize and/or tag the transaction to indicate its purpose (for an expense) or source (for a deposit).

        - **More about entering categories**
          Enter a category name, or click the drop-down arrow to select the category you want to use from a list. The list is divided into several groups such as personal income, personal expenses, business income, business expenses, 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.

      In the **Memo** field, enter a note. (Optional) You can display memo information in reports.
2. Select the account that will be used to pay or receive funds for this transaction.
3. In the **Method/Check Number** field, select a transaction type or enter a check number. The list of available methods depends on the type of account you've selected, whether the account is activated for transaction download, and so on.
4. Enter the amount of the payment or deposit.
5. Enter or change the date as necessary.
6. Click **Enter Transaction**.

## Notes

This dialog provides a form for transaction information that you can also enter directly in a spending account register.