# Quickbooks Online   Recurring (Memorized) Transactions

QuickBooks Online will allow you to save a recurring (memorize) transaction of any type that you can use as a template for creating transactions that occur on a regular basis (i.e. sales receipts, endowment fund receipts, bills, MI Statement bills, Weekly Lodge or Social Quarters Deposits, etc.).

If you had Memorized Transactions in the old Quickbooks, they can now be found by clicking on the Gear icon and selecting Recurring Transactions. To create a "Recurring Transaction" go to the screen that you would use to enter the transaction (*sales receipts, bill, deposit*).

Click on "+NEW", select the type of transaction you want to use.
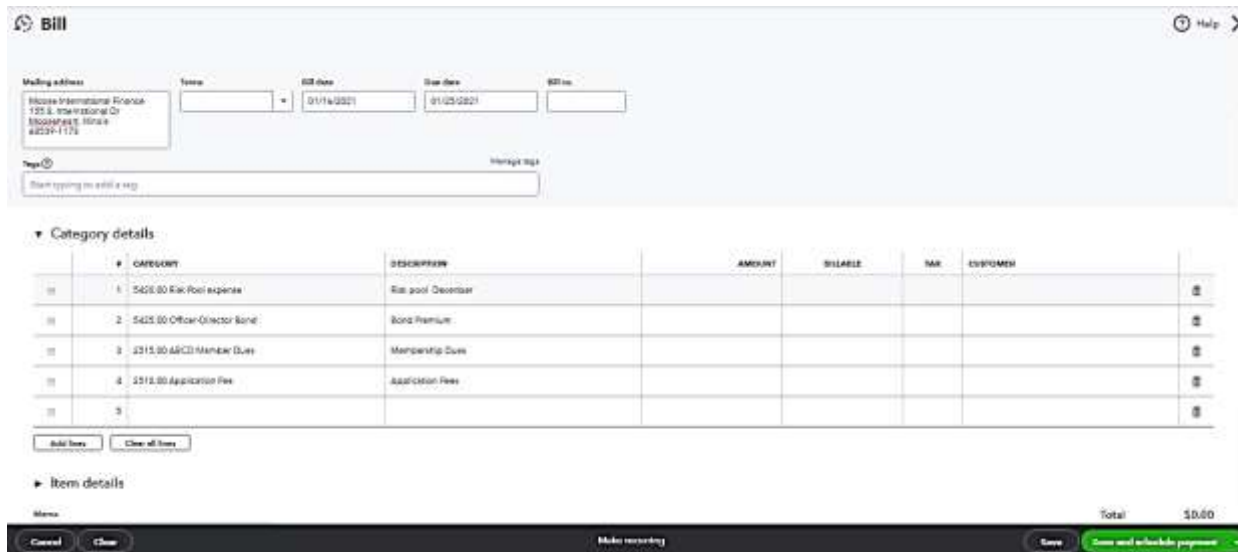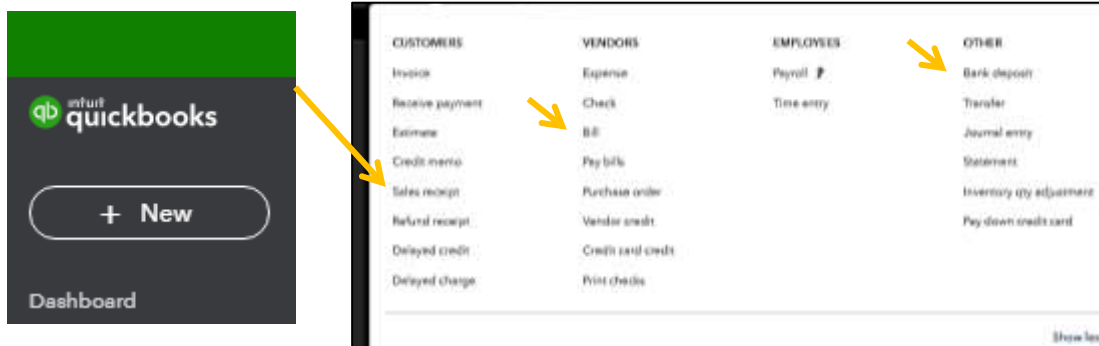
We have selected BILL

Complete the form with all the information you need each time you open it. In most cases you do not want to put in any dollar amount. To make this a recurring transaction, click on **Make recurring** at bottom of the page. (See previous page). Once you do, you will still see the transaction screen but it will now say Recurring *Bill* (or whatever type of transaction you are doing). There will be a space to **Name the Transaction** and there will be a **Save template** button on the bottom right side.   At the top it also gives you a space to schedule it. Under schedule you can schedule it to recur at a specific interval, or date, or you can make it unscheduled, or ask for a reminder.
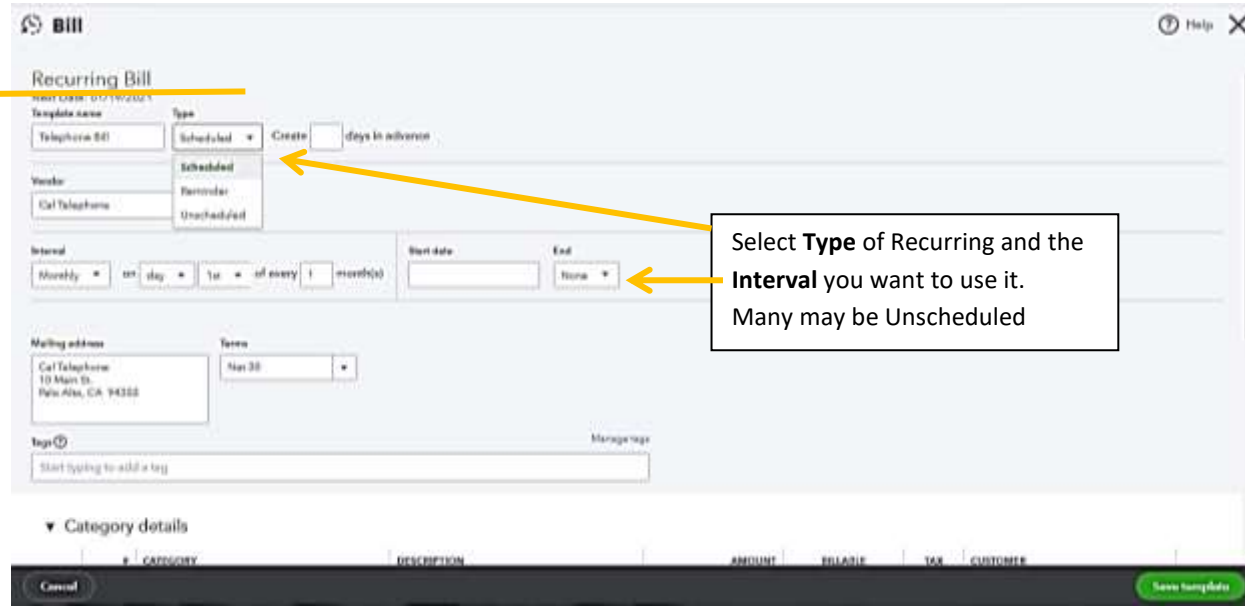
Once this is completely filled out to meet your needs click on

To find the transaction in order to use it, click on the "Gear" icon in the top right corner of the dashboard.

On the pop up window select **Recurring transactions** under the **LIST** Heading. This will open the list of available transactions.

This will be a list of all previously recurring (memorized) transactions that are available.
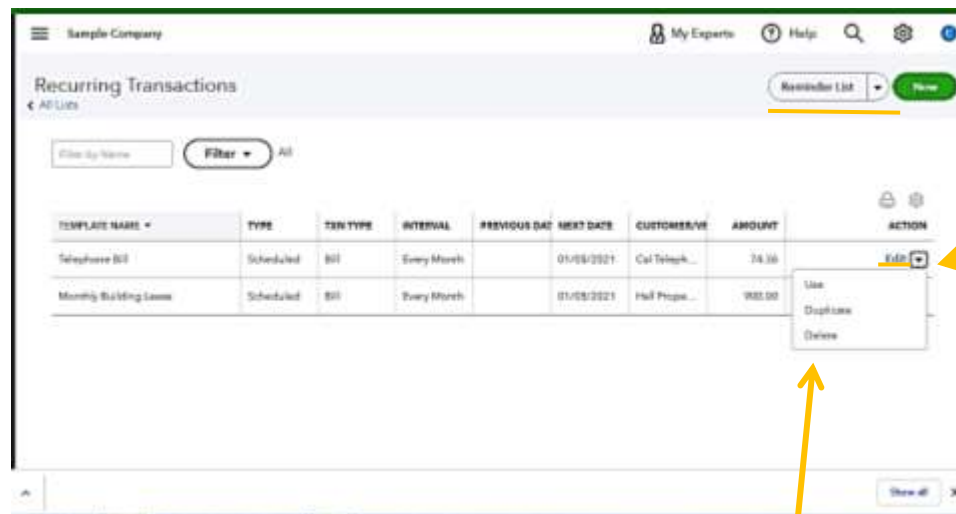
Select the transaction you want to use and click on the down arrow on the right side and click on **Use.** This will open the transaction and you can make any necessary changes (date, amount, add an account line) and Save. Here you can also **Duplicate** the transaction or **Delete** the Recurring Transaction. If you want to edit the Recurring Transaction, click on **Edit**, make your changes and save.

Each recurring transaction can be scheduled and you will receive a reminder in the **Reminder List**.

You can also initiate a **new** recurring transaction from the Recurring Transaction list by clicking on "NEW" in the in the right top part of the Recurring List screen.

You will then be able to select the type of transaction you want and create what you need. Also, on this screen you can see a **Reminder List**, and you can **Filter** the transactions to just see your scheduled, unscheduled, or the ones you want reminded of.

To group all the Bills together and all the Sales receipts or Deposits together, click on the word **TYPE** in the column header and it will sort them for you making it easy to find what you need. You may have a Sales Receipt, and a Bill with the same name such as Endowment.