Bills and Reminders Help

Adding A New Bill/Reminder

Add a bill or reminder by:

Clicking the **New** Button

or

Clicking the **Edit Menu** and selecting **New**.

or

Clicking on the Bill/Reminder List and then pressing the **Insert key**

or

Holding down the **Ctrl key** and pressing the **"N"** key

Duplicate reminders and bills are not allowed.

Updating a Bill/Reminder

Update a bill or reminder by clicking on the bill or reminder to be updated and then:

Clicking the **Update** Button

or

Clicking the **Edit Menu** and selecting **Update**.

or

Pressing the **Enter key**

or

Holding down the **Ctrl key** and pressing the **"U"** key

Duplicate reminders and bills are not allowed.

Deleting a Bill/Reminder

Delete a bill or reminder by clicking on the bill or reminder to be deleted and then:

Clicking the **Delete** Button

or

Clicking the **Edit Menu** and selecting **Delete**

or

Pressing the **Delete key**

or

Holding down the **Ctrl key** and pressing the **"D"** key

Copying a Reminder/Bill

Copy a bill or reminder by clicking on the bill or reminder to be copied and then:

Clicking the **Copy** Button

or

Clicking the **Edit Menu** and selecting **Copy**.

or

Holding down the **Ctrl key** and pressing the **"C"** key

Duplicate reminders and bills are not allowed.

Marking Reminders/Bills for Completing

Mark a bill or reminder for completion by clicking the first column (the check mark column) beside the bill or reminder to be marked.   Clicking this column toggles bills and reminders back and forth between being marked and unmarked.

Mark bills and reminders that you will be Completing at a later time.   As bills and reminders are marked and unmarked, the Total Amount Checked and Total Number Checked fields will be updated.

*****Use the Total Amount Checked field is for what if scenarios at bill paying times of the month.

Viewing Options

You can changes views on the screen by selecting from 3 options on the drop down list below the button bar.

1. Display Bills and Reminders

2. Display Bills Only

3. Display Reminders Only

The view selected will also affect the report printing by limiting the data on the report to the same data currently available on the selected view.

Completing a Bill/Reminder

Complete bills or reminders that have been <u>marked</u> previously by:

Clicking the **Do It** Button

or

Clicking the **Do It Menu** and selecting **Do Checked Items**

or

Holding down the **Ctrl key** and pressing the **"I"** key

Each bill and reminder marked will then be displayed to you one at a time. If it is a one time bill or reminder, you may delete it or cancel. If it is a reoccurring bill or reminder, you may reschedule it or cancel. In both cases, cancelling will leave that bill or reminder record unchanged and then proceed to the next marked record for completion.

Printing A Report

Print a report of the current <u>view</u> by:

Clicking the **Report** Button

or

Clicking the **File Menu** and selecting **Print Report**

or

Holding down the **Ctrl key** and pressing the **"P"** key

Duplicate Reminders and Bills

Duplicate reminders and bills are not allowed.   A duplicate occurs when attempting to create a bill or reminder with the same DATE DUE, FREQUENCY,   and DESCRIPTION as an existing record.   If you attempt to create a duplicate bill or reminder, you will receive a warning.