How do I edit, change, or delete a category or subcategory?

About editing, changing, or deleting a category or subcategory

You can rename a category at any time; Quicken updates the name on the associated transactions for you.

If you decide you no longer need a category, you can delete it. What about the transactions associated with the category you want to delete? Transfer their category assignment by either:

- Merging the category you don't want with another category that you do want.
- Recategorizing them (Quicken automatically presents this option when you delete a category with assigned transactions).

1. Choose **Tools** menu > **Category** List.
2. Right-click the category or subcategory you want to change.
   - **To change the name, properties, or tax line item association of a category**
     a. Choose **Edit**.
     b. As necessary make changes to the name or description, or to the category's designation as income, expense, subcategory, or discretionary spending.
     c. If you want to change a category so that it tracks tax-related transactions, select the Tax-related check box. In the Tax line item l ist, select the tax schedule line item that you want to associate with your category.
     d. Click **OK** to save the change.
   - **To demote a category to a subcategory**
     a. Choose **Edit**.
     b. Click **Subcategory of**.
     c. In the **Subcategory of** list, select the name of the main category that you want to assign your new subcategory to.
     d. Click **OK** to save the change.
        - How will I know if this worked?
          All transactions that use this category now show the original category as a subcategory of the category you selected. In the register, Quicken inserts a colon (:) between the two category names to indicate that the second category (the one you demoted) is now a subcategory of the first.

          For example, if you demote a category called Internet Service to a subcategory of Computer, the register displays the category for any associated transactions as Computer:Internet Service.
   - **To promote a subcategory to a category**
     a. Choose **Edit**.
     b. Select Income or Expense instead of **Subcategory of**.
     c. Click **OK** to save the change.
        - **What happens now?**
          When you promote a category in this way, Quicken changes the category in all transactions that were associated with the old subcategory. For example, transactions using the subcategory Computer:Internet Service would now use the category Internet Service, once you promote the subcategory.
   - **To move a subcategory to a different category**
     a. Choose **Edit**.
     b. In the **Subcategory of** list, select the name of the category to which you want to assign the selected subcategory.
     c. Click **OK** to save the change.
        - **What happens now?**
          Quicken changes the category in each of the transactions that you had categorized with the subcategory.
   - **To delete a category or subcategory**
     a. Choose **Delete**.
     b. Depending on whether the selected category has transactions associated with it, you may be given the option to recategorize th e affected transactions. If so, follow the on-screen instructions to select a replacement category.
        - What if I've selected multiple categories?
          If multiple categories are selected, Quicken prompts you to recategorize each one individually.

          When you use **CTRL+click** or **SHIFT+click** to select a group of categories that you want to delete, you're prompted to recategorize any categories that have associated transactions.
     c. Click **OK** to confirm the deletion.

Note

Certain categories (for example, investment categories that begin with the underscore character) are permanently used by Quicken and so can't be deleted.

About changing category types

A category type (such as Personal Income or Personal Expenses) depends on its designation as income or expense as well as its tax line assignment. You have a limited ability to change category types. Refer to the information below to see what applies to your situation. To make a change, follow the above procedure for changing the properties and tax line item association of a category.

What determines category types

Type	What it's based on

Personal (Income or Expense)	A tax line item assignment other than the ones specified in the Business and Rental sections, or no tax line item assignment
Investment	Predefined categories used by Quicken; you can't add new categories or move existing ones to this group
Business (Income or Expense)	Tax line assignments: Schedule C or Form 8829 (all assignments associated with these forms), Form 1099-MISC, and _MileageBus (this is a predefined category used by the Vehicle Mileage Tracker).
Rental Properties	Tax line assignments: Schedule E, and _MileagePer (this is a predefined category used by the Vehicle Mileage Tracker).
Transfers	Only accounts show up here (see About the Category List)