How do I review and accept my downloaded transactions?

After Quicken downloads your transactions, you can review the transactions before entering them in your register in a matching process called **Compare to Register.**

Compare to Register gives you the opportunity to choose what to do with each downloaded transaction. For example, is it a new transaction? Or should it match a transaction that has already been entered into the register? Compare to Register helps keep your registers accurate. If you don't want this level of control, Quicken has a great new time-saving feature called Automatic Transaction Entry.

1. Open the account you want to work with.
2. Click the **Downloaded Transactions** tab. If you'd like, you can click the column headings to sort the transactions.
3. Quicken assigns a **Status** to each downloaded transaction:
    - **For transactions marked New**
      A status of **New** means that Quicken did not find a match for the downloaded transaction in the register.
        - To enter the downloaded transaction in the register, click Accept.
        - If the downloaded transaction should be matched to a register transaction, click the **Edit** button, and then choose **Match Manually**. Quicken opens a window to allow you to select one or more transactions to match the transaction with. If you select more than one transaction, Quicken enters a split transaction in your account register with a single line for each selected transaction and a line for the difference in amounts, if any.
    - **For transactions marked Match**
      A status of **Match** means that Quicken has found a match for the downloaded transaction in the register. This happens when you enter a transaction in advance of it being downloaded. For example, if you use Quicken Bill Pay or Quicken Reminders.
        - If the downloaded transaction is correctly matched to a register transaction, click **Accept**.
        - If the downloaded transaction should not be matched to any register transaction, click the **Edit** button, and then choose Make New. Quicken changes the transaction's status to New.
        - If the downloaded transaction is matched to the wrong register transaction, click the **Edit** button and then choose **Unmatch**. Quicken attempts to match the transaction again. If no transactions are close enough, Quicken changes the transaction's status to New.
    - **For transactions marked Updated**
      A status of **Updated** means that your bill pay provider has changed your payment request in some way. For example, you may have requested that a payment be processed on a certain date, but it was processed slightly earlier because the requested date did not fall on a business day for your bill pay service provider.
        - To update the transaction information in your register, click **Accept**. If you prefer not to update the transaction, click Ignore instead.
    - **For transactions marked Canceled, Failed, or No Funds**
        - For transactions marked **Canceled**, **Failed**, or **No Funds,** click **Accept**. Quicken voids the transaction in your register.
4. You can delete one or more transactions if they do not match. Select your transaction(s), then delete them using the **Delete** key, **CTRL+D,** right-click **Delete Transactions**, or the **Delete** button. You will be asked to confirm the deletion.
5. When you've finished accepting transactions, click **Done**.

Can I undo accepting a transaction?

You can undo only the action of accepting multiple transactions (for example, if you clicked Accept All but later changed your mind). To do this: on the Downloaded Transactions tab, click Undo Accept All. Undo Accept All is available until you close Quicken or until you next update the account in question. You cannot undo transactions that have been accepted individually. Transactions having multiple attachments, receipts or Notes would be lost if you Undo Accepted/Reviewed transactions from other Quicken Products. You will have to Accept or Mark the transactions as reviewed and upload the attachments again.

Can I accept all transactions at once?

Yes. If everything appears correct in your downloaded transactions list, you can click **Accept All** to accept all transactions into your Quicken register.

Can I accept transactions automatically?

Yes you can. Quicken has a great new time-saving feature called Automatic Transaction Entry. Check it out!

Can I remove transactions from the list as I accept them?

Click the Hide Accepted button to remove transactions from downloaded transactions list as they are accepted into your register. This helps with readability. After clicking the button, its name changes to Show Accepted, which you can click again to restore the transactions to the list, if necessary.

What about accepting investment transactions?

The steps above apply only to spending account transactions (checking, savings, and credit card). The process for accepting downloaded investment transactions is different.

Why can't I find the Downloaded Transactions tab?

The **Downloaded Transactions** tab normally appears just below your Quicken register. If you don't see it, click here for more information.