Managing categories with the Category List

The **Category List** is a tool for organizing and tracking financial transactions. It includes categories, subcategories, and accounts within the current file, providing a structured approach to managing your finances.

Understanding the Category List

- **Categories and Subcategories:** In the **Category List**, categories appear in bold and represent the main classification of transactions, such as "Rent" or "Income." Subcategories, shown in regular text directly below their parent category, offer more specific transaction details, like "Rent: Utilities" or "Income: Salary."
- **Accounts:** Account names are displayed within [square brackets] on the **Transfers** tab. When you assign an account name as a category to a transaction, it acts as a transfer between your Quicken accounts.
- **System Categories:** Category names that begin with an underscore (_) are reserved for Quicken's use, such as in investment transactions. These categories are hidden by default and are added by Quicken as necessary. You cannot edit or delete these system categories.

Accessing the Category List

To access your **Category List**:

1. Select the **Tools** menu.
2. Choose **Category List** from the dropdown menu.

> **Keyboard Shortcut**
>
> You can directly access the Category List using the keyboard shortcut **Ctrl+Shift+C**.

This action opens the Category List window, where you can manage your categories and subcategories.

Managing Your Categories

Adding a New Category

1. In the **Category List** window, click the **New Category** button near the top right corner of the screen.
2. Enter the name of your new category or subcategory. For a subcategory, check the **Subcategory of** box and select a parent category.
3. You can optionally add a **Description** of the category.
4. If the category will be used to track tax-related transactions, you can add that information on the **Tax Reporting** tab.
5. Click **OK**.

Editing a Category

1. Right-click the desired category from the list and select **Edit**.
2. Modify the **Category Name**, **Subcategory of**, or **Description**. If you need to edit tax information, select the **Tax Reporting** tab.
3. Click **OK**.

Deleting a Category

1. Select a category and click **Delete**.
2. Confirm the deletion.

> Deleting a category used in transactions prompts you to reassign those transactions to a different category, affecting financial reports.

Tips for Effective Category Management

- **Regular Review:** Periodically review your **Category List** to ensure it aligns with your financial situation.
- **Leverage Subcategories:** Use subcategories for detailed tracking and better financial insights.
- **Customize as Needed:** Adjust the **Category List** to fit your personal or business financial tracking requirements.

More Information

How do I work with multiple categories in the Category List?