

How do I create a new category or subcategory?

About creating a new category

- You can customize the Category List by creating categories of your own and deleting or hiding categories that you don't need.
- If you plan to use your Quicken data when filing your income tax forms or when creating tax schedule or capital gains reports, set up tax-related categories so that Quicken can associate the correct data with the correct tax form.
- Specialized investment categories, which begin with an underscore (such as `_DivInc`), appear in the Category List as soon as you add an investment account.

About creating a new subcategory

Subcategories add detail within a category. For example, you can create subcategories under the Recreation category to track your spending on specific activities. Your reports show the subcategory amounts as subtotals for their parent category.

You can nest subcategories up to 16 levels deep. However, [Tags](#) may be a better solution.

1. Choose **Tools** menu > **Category List**.
2. Click **Add Category**.
3. Enter a name for the new category.
4. Indicate whether the category is for tracking income or expenses.
5. To change the category to a subcategory, select **Subcategory** of and enter the name of the parent category.
6. Enter a description for the new category. (Optional)
7. Assign a [category group](#) to the new category. This field appears only if one or more category groups exist. (Optional)
8. If the category is for tracking tax-related transactions, click the Tax Reporting tab and then select the Tax-related check box.
9. Indicate if you want to use the Standard or Extended line item list.
10. In the **Tax** line item field, select the tax form and tax schedule line item you want to use. (Optional)
 - What if I don't see the tax line item I want?
If you don't find your tax line item, or if you know the category is related to an uncommon tax form (for example, Form 8839: Qualified Adoption Expenses), click Extended List and look again.
 - Which tax schedules and forms does Quicken recognize?
Quicken recognizes a number of [tax schedules and forms](#).
 - About creating business categories
If the category is for tracking your business, assign a Schedule C tax line item to the category. This will put the category into the Business Income or Business Expense tab in the Category List and Category drop-down in the register, and include it in all applicable Business reports.
 - About creating rental property categories
If the category is for tracking your rental property, assign a Schedule E tax line item to the category. This will put the category into the Rental Income or Rental Expense tab on the Category List and Category drop-down in the register, and include it in all applicable Rental Property reports.
11. Click **Add**.

Note

Category names must be less than 40 characters long.