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

About changing the way transactions are categorized (recategorizing, merging, and more)

If you want to change categories assigned to specific transactions, recategorize them.

If you start off using two similar categories and then later decide that you need only one of them, you can merge the categories so that you don't lose any information that you've already entered. Note that you can merge only categories that have transactions associated with them. (Just delete unused categories that you don't think you'll need in the future.)

If you want to know how much you're spending on a certain category, choose Tools menu > Category List, right-click the category you're interested in, and choose Category report.

You can't undo the results of recategorizing or merging categories, so you may want to back up your data file before you begin. If the results are not what you expect, restore the backup copy and try the procedure again.

To change the category of several transactions (Recategorize)

1. Choose **Tools** menu > **Recategorize**.
2. Use the **Find** drop-down list to refine your search. (Optional)
    - **Why would I do this?**
      If you want to selectively recategorize, you can use the drop-down list to search only memorized payees, for example, or only scheduled bills and deposits.
3. In the with category drop-down list, select the category you want to change.
4. Click **Find**.
5. Select the transactions you want to recategorize, or click **Mark All** to select all transactions.
6. In the **Recategorize as** field, select the category you want to assign the transactions to.
7. Click Replace All or Replace Selected to recategorize the transactions.

Notes

- To find uncategorized transactions, enter a space in the with category field (step 3, above).
- To find exact matches of the category name (excluding all close matches), select Exact match.
- To recategorize lines within split transactions, you must first select the Show matches within splits checkbox, and then select the matching split lines.

To merge categories

1. Choose **Tools** menu > **Category List**.
2. Select the category you want to **Merge** - Then select the second category by pressing and holding CTRL and selecting the category.
3. Once you have selected your two categories you can then right-click and select the option **Merge all selected with another category.**
4. Select the category it will merge with. Select the dropdown menu and choose the best option for you.
5. Select **Delete unused selected categories** to remove the old category after the merge. (Optional).
6. Select **OK**. The categories will be merged.

Notes

- You can merge only categories that are in use—that is, categories that have transactions associated with them (click the minireport icon ).
- Instead of deleting an unused category, you can hide it.
- Use CTRL+click or SHIFT+click to select multiple categories to merge.

To look at all transactions that use a category

1. Choose **Tools** menu > **Category** List
2. Right-click the category or subcategory you're interested in.
3. Choose **Category** report to display a summary of transactions to which this category is assigned.
4. At the bottom of the minireport, click **Full Report** if you need additional detail.