How do I work with category groups?

Category groups organize your categories. For example, all of the categories related to your spending are grouped together in a category group called *Personal Expenses*. And all of the categories related to your income are grouped together in the *Personal Income* category group.

Customizing Category Groups

Category groups are can be customized. Whether you choose to create your own or use the default category groups, they can greatly simplify the presentation of your Quicken budgets and reports, and make finding and choosing categories in the register much easier.

1. Choose **Tools menu > Category List.**
2. Select **Options > Assign category groups.**
3. If this is the first group you have created, select **New Custom Group,** otherwise select **Add/Rename Custom Groups**.
4. Select **New.**
5. Enter a name for the category group.
6. Select **OK**

1. Choose **Tools menu > Category List.**
2. Select **Options > Assign category groups.**
3. Select **Add/Rename Custom Groups.**
4. Select the category group you want to rename.
5. Select **Rename.**
6. Enter the new name.
7. Select **OK** to close the Rename Category Group window.
8. Select **Done** to close the Custom Category Groups window.

Delete a category group

1. Choose **Tools menu > Category List.**
2. Select **Options > Assign category groups.**
3. Select **Add/Rename Custom Groups.**
4. Select the category group you want to delete.
5. Select **Delete.**
6. Select **Done** to close the Custom Category Groups window.

1. Choose **Tools menu > Category List.**
2. Select **Options > Assign category groups.**
3. Select a **Category** from the list on the left.
4. Select a **Category Group** from the list on the right.
5. Select **Add** to assign the selected category to the selected category group.

1. Choose **Tools menu > Category List.**
2. Select **Options > Assign category groups.**
3. Select the category from the list on the left.
4. Select **Remove** to remove the selected category from the selected category group.

You can include category groups only in summary, comparison, or budget reports.

1. Choose **Reports menu > Reports & Graphs Center**.
2. Select a summary, comparison, or budget report from the list of topics, such as **Banking > Banking Summary, or Spending > Historical Budget.**
3. Select **Customize.**
4. Select the **Display** tab.
5. In the **Organization** list, select **Category Group.**
6. Select the **Category Groups** tab.
7. Select the check box next to each category group you want to include in the report.
8. Select **Show Report.**

How should I use category groups?

Suppose you want to budget $100 a month for the categories Movies and Books, but you don't care how that $100 is split between the two. Instead of budgeting a specific amount for each category, you can assign the categories Movies and Books to the category group Discretionary, and budget $100 a month for Discretionary expenses.

Are there alternatives to category groups?

If you're considering using category groups, you may want to use tags instead. Tags provide the functionality of category groups but with more flexibility. Category groups are included for compatibility with earlier versions of Quicken.

Note for our Canadian Customers

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
Canada: "Colour" / United States: "Color"
Canada: "Centre" / United States: "Center"
Canada: "Realise" / United States: "Realize"
Canada: "Behaviour" / United States: "Behavior"
Canada: "Analyse" / United States: "Analyze"