How do I standardize payee names with renaming rules?

When you download transactions from your financial institution, the payees that you see in Quicken may not look the way you think they should. For example, if you buy breakfast at Anytown Coffeehouse, the transaction might be downloaded as ATC LLC 005 PLEASANTON. This is not ideal; the payee name is not easily recognizable, and it is not consistent with other Anytown Coffeehouses you might visit. Renaming rules can fix this.

Renaming rules tell Quicken to substitute a standardized, easily recognizable payee name when a similar payee is downloaded from your financial institution.

Note: Renaming rules don't change transactions already recorded in your register; they affect only transactions that will be downloaded in the future.

To create a renaming rule
From a Quicken register:

1. If necessary, open the register containing the payee to be renamed.
2. Click the payee name in the Payee field, and enter what you would like the payee to be when Quicken downloads it in the future.
3. Click **Save** to record the transaction and create the renaming rule.
4. If Quicken needs more information to create the renaming rule, a secondary dialog displays. If you need assistance in this dialog, click the Help icon.

From the Renaming Rules dialog:

1. If necessary, choose **Tools** menu > **Renaming Rules**.
2. Click **Add a Rule** at the bottom of the Renaming Rules dialog.
3. In the **Change payee to** field, enter or edit the name you want to use for the payee. In other words, the name you want to change similar payees to.
4. In the drop-down, select **Payee contains** or **Quicken name** is to specify the type of renaming rule to create.
   - **What's the difference?**
      - **Payee contains**: When you download new transactions, Quicken searches the combined text of the downloaded Payee and Memo fields for the text you enter (in the next step). A match occurs, and the downloaded payee is renamed, if the text you enter appears in the same order, and not as a substring, somewhere within the combined fields. Examples:Parker matches Park er Supplies; Parker does not match ParkerSupplies; Parker Suppliesmatches Parker Supplies Company; Parker Supplies does not match Supplies by Parker Company.
      - **Quicken name is:** When you download new transactions, Quicken searches its own database of common merchant names for the text you enter (in the next step). A match occurs, and the downloaded payee is renamed, if the text you enter exactly matches a merchant in the database. The search is performed after all other renaming rules have been run. Examples: Parker Supplies matches Parker Supplies; Parker does not match Parker Supplies, or any other variant such as Supplies by Parker.
      - For more information, see How Quicken suggests categories and payees
5. In the text box, enter the words to search for. Comparisons are not case sensitive.
   - **Example**
     If Anytown Coffeehouse is the name of the renaming rule, and you select Payee contains and enter Anytown Coffee as the words to search for, then both Anytown Coffee Pleasanton, and Anytown Coffee 005 would be renamed to Anytown Coffeehouse.
6. To save the rule, click **OK**.

To create a renaming rule for multiple payees

1. Choose **Tools** menu > **Memorized Payee List**.
2. Use **CTRL+click** to select transactions that contain similar payee names. For example, you might select Anytown Coffee Pleasanton, and Anytown Coffee 005. (Alternatively, use **SHIFT+click** to select adjacent payees.)
3. Click **Merge/Rename.**
4. Enter the new name you want Quicken to use.
5. Select Apply to future downloaded transactions to have Quicken automatically rename similar payees in the future.
6. Click **OK**.
7. Create the renaming rule. If you need assistance, click the Help icon.

To view or restore the original name of a payee that has been renamed

The Revert to menu item (described below) toggles between the original name and the renamed name of the payee in the selected transaction. For example, if you follow the steps above to restore the original name of a particular payee, you can use the right-click menu a second time to revert to the payee's renamed name.

1. If necessary, open the register containing a transaction where the payee has been renamed.
2. Right-click the renamed payee.
3. In the right-click menu, look for the words "Revert to" followed by the original payee name.
4. To restore the original name, choose **Revert to**.

Frequently Asked Questions

How do I turn off renaming rules?

1. If necessary, choose **Tools** menu > **Renaming Rules.**
2. In the **Renaming Rules** dialog, click Preferences.

- To turn off the renaming rules you have created, deselect Use my existing renaming rules.
- To turn off Quicken's suggested payee names, deselect Automatically apply Quicken's suggested name to payee. To learn more about how this works, see How Quicken suggests categories and payees.

How do I see all my renaming rules?

Choose **Tools** menu > **Renaming Rules.**

How do I edit or delete a renaming rule?

1. If necessary, choose **Tools** menu > **Renaming Rules**.
2. In the **Renaming Rules** dialog, select the rule you want to change.
3. Click the **Edit** icon (the pencil), the **Add** icon (the green circle), or the **Delete** icon (the red circle) and make changes, as necessary. Click the Help icon if you need assistance.

What Quicken preferences affect renaming rules?

The behavior of renaming rules is affected by Downloaded Transactions preferences settings.

How do I prevent Quicken from renaming specific payees?

1. If necessary, choose **Tools** menu > **Renaming Rules**.
2. In the **Renaming Rules** dialog, click the Do-Not-Rename Rules tab.
3. Click **Add a Rule**.
4. Use the fields provided to enter information about payees you don't want Quicken to rename.
5. Click **OK**.

What account and payee types do renaming rules work with?

- Renaming rules are available only for online-enabled accounts.
- Renaming rules can't be used to change the names of online payees.
- You can create renaming rules by editing the payee names of previously downloaded transactions directly in your account register. However, the rule is applied only to the transaction you edit and to future downloaded transactions for this payee. Other transactions for this payee are unaffected.