

What if a renaming rule isn't working?

How renaming rules work:

When you download transactions from your financial institution, Quicken first compares the downloaded payee name with the renaming rules you've created (to see the list, choose **Tools** menu > **Renaming Rules**). If it doesn't find a match, it compares the downloaded payee name to its database of standardized merchant names.

Possible outcomes:

- **It matches one of your renaming rules.**
The downloaded payee name matches one of your renaming rules. In that case, the payee name you specified in the renaming rule is substituted for the payee name Quicken downloaded from your financial institution.
If necessary, you can disable the processing of all renaming rules in your [Downloaded Transactions preferences](#).
- **It does not match one of your renaming rules.**
If the downloaded payee name does not match one of your renaming rules, Quicken then compares the downloaded payee name with its database of standardized merchant names. If it finds a match, the payee name in the database is substituted for the payee name that Quicken downloaded from your financial institution.
If necessary, you can disable the search of Quicken's database of merchant database in your [Downloaded Transactions preferences](#).
- **Does not match a merchant in Quicken's database of merchant names**
The downloaded payee matches neither a renaming rule nor a merchant in Quicken's database of merchant names. In that case, the downloaded payee name is entered into Quicken precisely as Quicken received it from your financial institution.

Things to try if a renaming rule isn't working:

Turn on renaming rule confirmations.

When renaming rule confirmations are turned off, Quicken automatically creates renaming rules without asking you to review them first. Unfortunately, sometimes this can lead to rules that don't work quite right. (To look at your current renaming rules, choose **Tools** menu > **Renaming Rules**.)

We recommend that you turn on renaming rule confirmations. Confirmations let you review any renaming rules before they are created and, if necessary, customize them to better suit your needs. Here's how:

1. Choose **Edit** menu > **Preferences**.
2. In the left pane, select **Downloaded transactions**.
3. In the **Your Renaming Rules** area, located in the right pane, select **Let me review/confirm the automatically created rules**.
4. Click **OK**.

Delete the existing renaming rules for a payee

Sometimes it's easier to start over with a renaming rule than it is to try and debug it.

If you are having trouble with a bothersome renaming rule, here's how to delete it:

1. Choose **Tools** menu > **Renaming Rules**.
2. In the **Renaming Rules** dialog, select the rule you want to delete.
3. Click the **Delete** icon (the red circle).

Disable the search of Quicken's database of merchant names

If a downloaded payee name does not match one of your renaming rules, Quicken then compares the downloaded payee name with its database of standardized merchant names.

While Quicken's database of standardized merchant names is extensive, it is not complete, and mismatches can occur. If you see unexplainable payee name substitutions, try turning this feature off. Here's how:

1. Choose **Edit** menu > **Preferences**.
2. In the left pane, select **Downloaded transactions**.
3. In the **During Transaction Download** area, located on the right pane, deselect **Automatically clean up payee names**.
4. Click **OK**.



Please explain how I add a renaming rule

See our topic, [How do I add or edit renaming rules?](#)