Automatic Transaction Entry settings

Downloaded transactions preferences is a Quicken feature that enters downloaded transactions into a register or investment transaction list as soon as they are received. No action on your part is required to enter the downloaded transactions into a register.

If you've manually entered transactions, Quicken automatically matches those transactions with their corresponding downloaded transactions so you don't end up with duplicates.

You can determine which transactions are new by examining the column headed by a blue-coloured ball. Those with a dark blue ball are the newest; those with a lighter shaded blue ball are slightly older, and those with no ball are the oldest.

- **To turn Automatic Transaction Entry On/Off for all accounts**
    1. Choose **Edit** menu > **Preferences**.
    2. In the left pane, select **Downloaded transactions**.
    3. In the right pane, check or uncheck Automatically add to banking registers and Automatically add to investment transaction lists.
    4. Click **OK**.
- **To turn Automatic Transaction Entry On/Off for selected accounts**
    1. Choose **Tools** menu > **Account List**.
    2. Click the **Edit** button next to the account you want to change.
    3. In the **Account Details** dialogue, click the **Online Services** tab.
    4. In the **Online Setup** area, click **Automatic entry is: [On or Off]**.
    5. In the **Automatic Transaction Entry** dialogue, choose one of the following options:
        - **Use the general account-preference that applies to all accounts**
          The account will inherit the general **Automatic Transaction Entry** setting that is selected in your **Quicken Preference**s.
        - **Yes - Always automatically add transactions for this account**
          Quicken will always automatically enter transactions into the account, regardless of the **Automatic Transaction Entry** setting in your **Quicken Preferences**.
        - **No - Never automatically add transactions for this account**
          Quicken will never automatically enter transactions into the account, regardless of the **Automatic Transaction Entry** setting in your **Quicken Preferences**.
    6. Click **OK**.