

Create a payee renaming rule

Renaming rules help to make payee names more readable. In many cases, the name downloaded from the bank will have extra information that is not of use to you and makes the payee hard to read.

To create a new renaming rule


1. In the register, select a transaction from the payee you want to rename.
2. Type a new name for the payee in the **Payee** column.
3. Click a different transaction. The **Create Payee Renaming Rule** window will appear.
4. Review the text in the If the **Downloaded payee name contains this text** field.

The text in this field was downloaded directly from your financial institution. It may be all, or just a portion of the downloaded text.

The complete text of what was downloaded from your financial institution is displayed in the bottom half of the bottom half of the Create Payee Renaming Rule dialog.

5. Review the text in the **Replace with this name** field.
6. If you would like to change the "payee name contains" use the button **Edit Custom Rule** to change the text.
7. Click **OK**.

To delete a renaming rule

1. Go to **Tools** menu **Renaming Rules**.
2. On the **Renaming Rules** screen, select the rule you want to delete.
3. Click the red minus icon .
4. Click **OK** to confirm you want to delete the renaming rule.
The renaming rule will no longer appear.

For more information

- [Standardize payee names with renaming rules](#)
- [How Quicken suggests categories and payees](#)
- [Downloaded transactions preferences](#)