Downloaded Transactions preferences

Downloaded transactions are transactions that are communicated to you from your financial institution rather than entered manually. Ti set preferences for these transactions

1. Choose **Edit** menu > **Preferences**.
2. In the left pane, select **Downloaded transactions**.
3. In the right pane, select the settings you want to use.

After Downloading Transactions

Automatically add to banking registers

When this option is selected, Quicken will enter downloaded banking transactions into all of your registers as soon as they are received. If you've manually entered transactions, Quicken automatically matches those transactions with their corresponding downloaded transactions so you don't end up with duplicates.

If you do not use this option all downloaded transactions must be manually reviewed and accepted before they are added to your registers. Unaccepted transactions will not appear in reports, graphs, and other product features.

Learn how to enable or disable this feature for individual accounts

Automatically add to investment transaction lists

When this option is selected, Quicken will enter downloaded investing transactions into all of your investment transaction lists as soon as they are received. If you've manually entered transactions, Quicken automatically matches those transactions with their corresponding downloaded transactions so you don't end up with duplicates.

If you do not use this option all downloaded transactions must be manually reviewed and accepted before they are added to your investment transaction lists. Unaccepted transactions will not appear in reports, graphs, and other product features.

Learn how to enable or disable this feature for individual accounts

During Transaction Download

Automatically categorize transactions

Select this option to have Quicken suggest categories to assign to new transactions as they are downloaded. For more information, see How Quicken suggests categories and payees for you.

Automatically apply Quicken's suggested name to payee

Select this option to have Quicken automatically rename your transaction payees as they are downloaded, based on a database of standardized merchant names. If you deselect this option, your existing renaming rules in Quicken are still used (click the **Renaming Rules** button in this dialog to see a list of those rules). For more information, see How Quicken suggests categories and payees.

About ACE

Quicken has implemented Automatic Categorization Engine (ACE) functionality in an effort to make entering downloaded transactions easier and more uniform across multiple users. ACE learns and evolves based on user-modified data and, as such, may display different names than you would expect. For more information see this support article about ACE.

Capitalize first letter only in downloaded payee names
For example, the downloaded payee ANYTOWN COFFEE would automatically be renamed as Anytown Coffee.

Your Renaming Rules

Use my existing renaming rules

When this option is selected, Quicken will use your existing renaming rules to automatically rename similar payees for future downloaded transactions. Click **Renaming Rules** to see a list of the rules you've created.

Renaming Rules button

Click the Renaming Rules button to access a window where you can view, create, and change your payee renaming rules.

Automatically create rules when I rename payees

When this option is selected, Quicken will create renaming rules when you manually edit payee names in the register.

Let me review/confirm the automatically created rules

Select this preference to be notified whenever a new renaming rule is created.

1. Click **OK** to save your changes.