

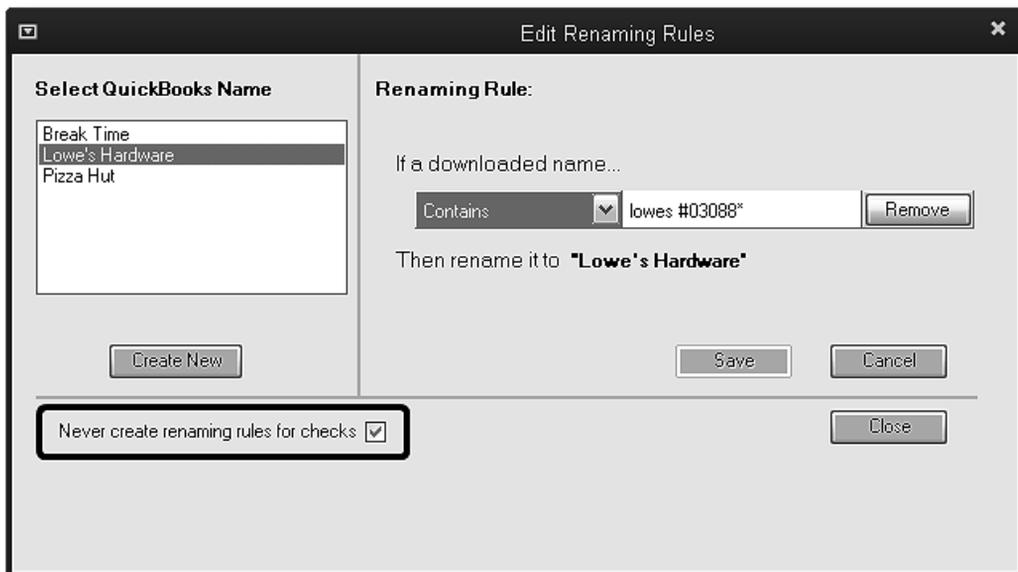
How to Manage and Edit Renaming Rules

You can view, edit, and delete renaming rules from the Add Transactions to QuickBooks window.

1. **Open the Add Transactions to QuickBooks window**, as described in the prior chapter^[36].
2. **Click on the Renaming Rules link** in the upper right corner of the window.



The Edit Renaming Rules window will open.





What is the purpose of the *Never create renaming rules for checks* setting?

Check marking this box, which is toward the bottom of the Edit Renaming Rules window, prevents QuickBooks from creating renaming rules for downloaded transactions which have the word "Check" in the Payee field. This setting is **highly recommended for most users** but depends on what your bank puts in the Payee field of check transactions.

Suppose for instance, that your bank always puts the word "Check" along with the check number in Payee field, such as "Check #4435". Further, suppose that while adding Unmatched transactions you complete this check by assigning "Miller Lumber Co." as the payee.

As you may recall, when you assign a Payee to an Unmatched transaction QuickBooks will automatically add a new renaming rule to associate the original Payee name (in this case, "Check #4435") with the vendor name you assigned ("Miller Lumber Co.").

The problem with letting QuickBooks add a renaming rule for a payee named "Check #4435" is that this payee name *won't ever be encountered again*—or at least it is not very likely. If you write ten checks to Miller Lumber Company during the year, QuickBooks will add *ten different renaming rules* for the "Miller Lumber Co." vendor—each of them differing only by their check number!

An even worse problem is possible...

Suppose your bank simply puts "CHECK" in the Payee field of all check transactions. If you assign the "Miller Lumber Co." vendor to the first check you process, QuickBooks will create a renaming rule which assigns that vendor to *all downloaded checks!* Why? Because all of them have the same payee name, "CHECK".

The solution to both problems, is to use the ***Never create renaming rules for checks*** setting, which prevents QuickBooks from adding renaming rules when the Payee field contains the word "Check".

Editing a Renaming Rule

Editing a Renaming Rule can make it apply to a wider range of customer or vendor name variations, to better automate the process of downloading transactions.

1. **Open the Add Transactions to QuickBooks window** , as described in the prior chapter.

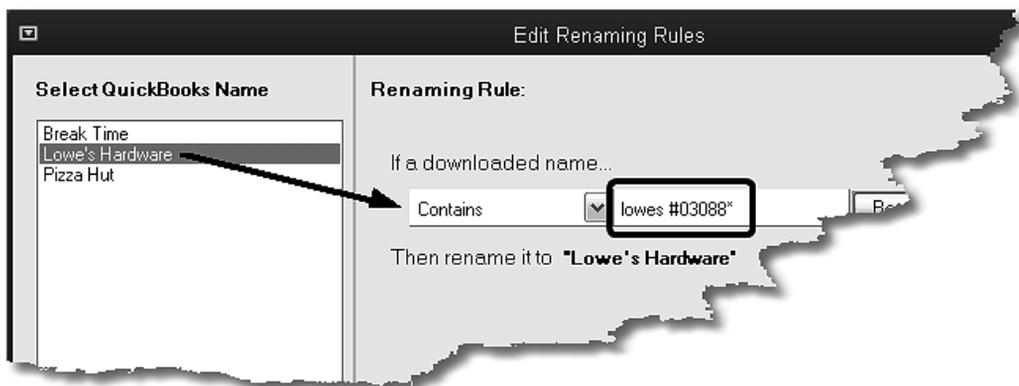
2. Click on the **Renaming Rules** link in the upper right corner of the window.



The Edit Renaming Rules window will open.

3. In the left pane of the Edit Renaming Rules window, **click on a QuickBooks Name** (Customer, Vendor, etc.) to work with.

The right pane of the window will then show the renaming rules defined for the name you selected.



The rule in this example applies the "Lowe's Hardware" vendor name to transactions with "lowes #03088*" in their Payee field. But we can edit the rule to make it work for transactions from *any* Lowe's store.

4. **Edit the text of the rule** so that instead of "lowes #03088*" it reads simply "lowes".
5. **Click the down-arrow to the left of the text**, to see the list of matching options.