

Matching

Quicken provides filters that let you define what must be true about a transaction for it to be included in search results.

For example, you can include only transactions with a specific payee by typing the payee's name in the Payee Contains field.

To use matches to filter transactions:

Enter the exact payee, memo, or category to match, using QuickFill, the Payee, Memo, or Category fields, or special match characters, shown below.

Use upper- or lowercase (it doesn't matter). Quicken also ignores any spaces before or after the phrase you enter.

For a category, class, or memo match, Quicken also searches through entries in the Split Transaction dialog.

Match character	Type of match
= (equal sign)	An exact match (include only transactions that exactly match the text you type)
.. (two periods)	A match that contains unspecified characters where you type .. (at the beginning, in the middle, or at the end of the text you type)
? (question mark)	A match with one unspecified character
~ (tilde)	The result excludes all matches for the text that follows

Match character is: = (equal sign)

An exact match (include only transactions that exactly match the text you type)

Example	The result includes	The result doesn't include
=tax	tax, Tax, TAX	taxable, tax deduction, Tax Self:State, surtax, new tax loss, rent, utilities
~=tax	taxable, tax deduction, Tax Self:State, surtax, new tax loss, rent, utilities	tax, Tax, TAX

Match character is: .. (two periods)

A match that contains unspecified characters where you type .. (at the beginning, in the middle, or at the end of the text you type)

Example	The result includes	The result doesn't include
=..tax	tax, Tax, TAX, surtax, property tax	taxable, tax deduction, Tax Self:State, new tax loss, rent, utilities
tax..	tax, Tax, TAX, taxable, tax deduction, Tax Self:State	surtax, new tax loss, rent, utilities
t..x	trix, tx, tkx, t-----x, tax, Tax, TAX	taxable, tax deduction, Tax Self:State, surtax, new tax loss, rent, utilities
..	tax, rent, utilities	transactions that are blank in the specified field (for example, uncategorized transactions)

Match character is: ? (question mark)

A match with one unspecified character

Example	The result includes	The result doesn't include
==t?x	tkx, tax, Tax, TAX	trix, tx, t-----x, taxable, tax deduction, Tax Self:State, surtax, new tax loss, rent, utilities

Match character is: ~ (tilde)

The result excludes all matches for the text that follows.

Example	The result includes	The result doesn't include
~tax	rent, utilities	tax, Tax, TAX, taxable, tax deduction, Tax Self:State, surtax, new tax loss
~..	transactions that are blank in the specified field (for example, uncategorized transactions)	