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Select preferences:

Downloaded transactions preferences

After downloading transactions ⓘ

- ☐ Automatically add to banking registers
- ☐ Automatically add to investment transaction lists

Compare account portfolio after download ⓘ

[Settings...](#)

Lot assignment after investment download ⓘ

[Settings...](#)

During transaction download

- ☒ Automatically categorize transactions
- ☒ Automatically apply Quicken's suggested name to payee
- ☒ Capitalize first letter only in downloaded payee names

Your renaming rules

- ☒ Use my existing renaming rules [Renaming Rules...](#)
- ☒ Automatically create rules when I rename payees
- ☒ Let me review/confirm the automatically created rules



OK

Cancel