How do I edit an investment transaction?

If you need to make a correction to an investment transaction, you can either use forms that are specific to the type of transaction you're working with or edit the transaction list directly (as you would with a register).

The specific fields available for editing an investment transaction depend on the type of transaction you're working with (for example, a buy or a sell). There is limited support for changing the transaction type (for example, from a Buy to a CvrShrt or BuyBond). If the transaction type you need is not displayed in the drop-down list, you must first delete the original transaction and then enter a new one.

Investment transaction lists can also contain special types of transactions that record only your position for a security (the number of shares you own). These are called placeholder entries.

1. Open the account you want to use.
2. In the investment account transaction list, select the transaction you want to change.
3. On the transaction toolbar, click **Edit**.
4. Use the form to change the information as necessary.

Notes

- Alternatively, you can edit the transaction directly in the transaction list.
- You can display the transaction list in two-line mode by editing the investment transaction list preferences.