How do I customize my investment transaction list?

You can customize many aspects of the Quicken investment transaction lists to suit your own way of working.

Any changes made in the Investment Transaction List Preferences window will apply to all of your investment accounts. These settings change only the way your data is displayed (not the actual data).

Change the name that appears at the top of the transaction list

This is the account name. You can change it by editing the account.

Show transactions on one or two lines

1. Open the investment transaction list preferences window.
2. In the right pane, use the List display drop-down to select whether to display your investment transaction lists in one- or two-line mode.
3. Click **OK** to save your changes.

Notes

By default, investment transactions are shown on one line. Switch to two-line display mode if you want to view more information for each individual transaction.

- One-Line Display shows twice as many transactions on the screen.
- Two-Line Display allocates two lines for each transaction, and the Memo fields are visible.

Change the sort order of transactions in the transaction list

1. Open the investment transaction list preferences window.
2. In the right pane, use the **Sort choice** drop-down list to display your investment transactions by date in ascending or descending order.
3. Click **OK** to save your changes.

Notes

Alternatively, you can click the Clr, Date, Action, and Security column headings to sort on those columns within a transaction list.

Adjust the width of the transaction list columns

Position your pointer on the dividing line to the right of the column heading you want to adjust. When the pointer changes from an arrow to a resize icon (horizontal arrows pointing left and right), click and drag to increase or decrease the column width.

Show any hidden transactions

1. Open the investment transaction list preferences window.
2. In the right pane, select **Show hidden transactions**.
3. Click **OK** to save your changes.

Notes

Select this option to view balance adjustments and previously resolved placeholder transactions for your accounts. This gives you greater control of your balance should you need to remove these transactions to correct historical errors. In addition, you can see how your account calculates the balances for your securities and for cash.

- **Show the Attach button**
  The Attach button appears next to the Enter, Edit, and Delete buttons at the bottom right of the current transaction. It provides a way for you to attach an electronic image to a transaction.
- **Automatically update quotes every 15 minutes**
  Quicken will automatically retrieve quotes for your securities every 15 minutes. This feature is available in Quicken Premier, Home & Business, and Rental Property only.