

About manually entering investment transactions

Although downloading is generally the simplest method, there may be times when it makes sense to enter investment transactions manually. For example, most brokers keep historical transactions available for download for only a limited time. If you've had an account with that broker for several years, you may want to enter transactions manually for at least some of that historical data. To learn more about entering historical transactions, see [Decide how much historical data to enter](#).

What can I do?

- [How do I fund my investment account?](#)
- [How do I enter transactions for my cash management account?](#)
- [How do I buy a security?](#)
- [How do I buy a bond? \(All types except U.S. Savings bonds\)](#)
- [How do I buy exchange-traded options?](#)
- [Add shares to an account](#)
- [How do I sell a security?](#)
- [How do I remove shares from an account without affecting the account's cash balance?](#)
- [How do I transfer cash into or out of an account?](#)
- [How do I record a miscellaneous expense?](#)
- [How do I record a margin interest expense?](#)
- [How do I transfer shares?](#)
- [How do I create an investment reminder?](#)
- [How do I record a short sale](#)
- [How do I cover a short sale?](#)
- [How do I adjust the share balance?](#)
- [How do I redeem shares for IRA custodial fees?](#)
- [Tell me about the investment transaction list's Actions](#)