Edit a transaction

About editing investment transactions

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.

Edit another type of transaction (in an account register)

If you make a mistake when entering a transaction, it's easy to enter edits and corrections.

1. Open the account that contains the transaction you need to edit.
2. In the account register, select the transaction you want to change.
3. Click in the fields you want to change and type or select new information.
4. Click **Save** to record the changes.
   If you leave a transaction, change column sizes, or do other file operations before clicking Save, Quicken asks you to confirm any changes you made and then saves them. You can turn this reminder off by clearing the Before changing existing transactions check box in the Notify Preferences dialog.

Notes

Is there any part of an account register that I can't edit?

- You can't edit the Balance or Amount columns.
- If you need to change the balance during reconciliation, you must add a payment or deposit to make up the difference or have Quicken adjust the difference for you.
- Certain restrictions also apply to editing online payments that have been sent for processing.

What if I need to restore a register transaction back to the way it was before I made my edit?

1. In the account register, select the transaction you want to change.
2. Either choose Edit menu > Transaction > Restore Transaction, or press the Esc key.

What should I keep in mind when editing a transaction?

Changing a reconciled transaction affects future reconciliations. Quicken lets you know if you're about to change a reconciled transaction and asks you to confirm the change.

To protect your data from accidental or unauthorized changes, you can set up two kinds of passwords. You can require a password before opening a file or before changing transactions entered before a certain date.

What if I want to edit a transfer that is part of a split transaction?

If the transaction you're changing is a transfer that was part of a split transaction, you can't change it from the account that received the transfer (the transfer to account). You need to go to the other account (the transfer from account) to make the edit.