

Edit Transactions

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Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward, review [User Permissions for Edit Transactions](#).

There are multiple ways to edit transactions in Jackrabbit. Edit all transactions or single transactions using the results grid under the *Transactions* menu > [Search Transactions](#) page. In addition, individual transactions can be edited directly within a *Family* record.

You select which users have permission to edit or delete transactions. All users with this ability should be aware of how either task can affect a family's account. It is a best practice to edit a transaction rather than delete it. However, deleting the transaction is appropriate if it was created in error.

Transactions can be restored - contact [Jackrabbit Support](#) for assistance.

**Expand/Collapse
All**

Edit Transaction Rules


To protect important data, not all fields in a transaction can be edited, and there are restrictions on when the amount field of a fee or payment can be changed.

- The *amount* of a fee transaction cannot be edited if it is **linked** to a payment. Unlink the payment from the fee to make your edit and then relink it.
- The *amount* of a payment transaction cannot be edited if it has been applied to fees. Unlink the fees to make your edit and then re-apply the payment.
- The *amount* of a refunded payment transaction cannot be edited.
- For ePayments, the following fields cannot be edited: *Location, Transaction Date, Transaction Type, Amount, Payment Method, Check #, Credit Card Last 4, or Date Paid*.
- The following fields cannot be edited for payments and refunds: *Transaction Date, Transaction Type*.

Edit Multiple Transactions from the Transactions Menu > Search

Follow these steps to edit all transactions or select a group of transactions from the *Transactions* menu > *Search* results grid.



1. Leave the 1st column of checkboxes blank to select all the results in the grid, or use the checkboxes in the 1st column to select which transactions to edit.

2. Click the **Edit Transactions** icon  to open the **Edit Transactions** window, and you will see the following:
 - The number of transactions to be edited
 - Fields that are not editable are grayed out
 - An explanation of which **editing rules** were broken
3. Use the **X** to remove any transactions (in the *Transaction Groups with Issues* section) that have 'broken a rule' to open up the grayed-out fields and continue editing the remaining transactions.
4. Click **Save Changes** when done.
5. Click **Yes, I'm Sure** when prompted to confirm the changes and be returned to the Search Transactions grid results where your recently edited transactions will be displayed.

Edit a Single Transaction

Select one of the options below to open the *Edit Transactions* window to make an edit to a single transaction.

Transactions menu > *Search*

1. Go to the transaction you want to edit in the **Search Transactions** results grid.
2. Use the row menu icon  > **Edit** to open the **Edit Transaction** window.
 - Or use the row menu icon  > **Link Details** > click the pencil icon to open the **Edit Transaction** window to edit a linked record.

Family record > Transactions Tab

1. Locate the transaction you need to edit in a *Family record > Transactions* tab.
2. Click the pencil icon to open the **Edit Transaction** window.
3. Make the changes keeping in mind the [editing rules](#) mentioned in the first section above.

Transaction Links Details window

1. Locate the transaction you want to edit in a *Family record > Transactions* tab.
2. Click the **View Transaction Link Details** icon to open the **Transaction Links Details** window.
3. Click the pencil icon to open the **Edit Transaction** window.
4. Make the changes keeping in mind the [editing rules](#) mentioned in the first section above.

In the **Edit Transaction** window, make your changes keeping the above [editing transaction rules](#) in mind. Be sure to **Save Changes**.

Use caution when editing transactions as it can cause discrepancies with information already transferred to your accounting system, e.g. exported to QuickBooks.

