How to Edit an Existing Expense

1. Open Expense History.
2. Find the expense using date, payee, or search filters.
3. Open the row’s action menu and choose **Edit**.
4. Correct the necessary fields.
5. Review the payee, payment method, amount, funding source, category, and supporting details.
6. Save the changes.

Edit a financial record only to correct or complete it. Preserve attachments and reference details that support the original transaction.

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