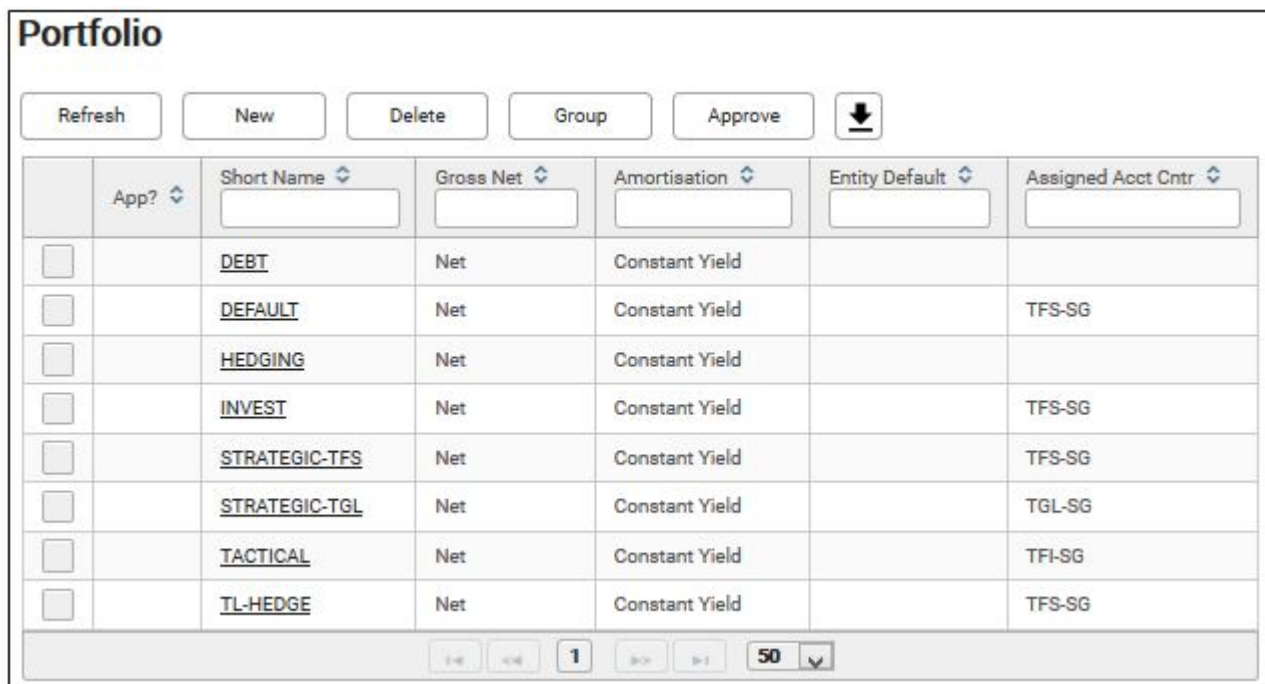# Amend Portfolio Group (W5)

PURPOSE

This document shows how to amend and maintain portfolio group.

WHY IS THIS IMPORTANT?

This allows maintaining portfolio group name when changes are required.

PROCEDURE

1. Select Set Up > Risk > Portfolio.

2. Click Group. The Portfolio Group screen will be displayed.

3. Click the Short Name of the Group being changed. In this example, TFS Portfolio Group will be changed.

Portfolio Group

	Short Name ⇕	Description ⇕
☐	Hedges Port	Hedges Port
☐	TFS Portfolio Group	TFS Portfolio Group

Refresh | New Group | Delete Group

|◄ ◄◄ **1** ►► ►| **50** ⌄

4. The Amend Portfolio Group screen will be displayed.

Amend Portfolio Group

Save | Duplicate | Assign Member

Short Name* — TFS Portfolio Group

Long Name — TFS Portfolio Group

Description — TFS Portfolio Group

5. In this example, the short name, long name and description will be changed.

Amend Portfolio Group

Save | Duplicate | Assign Member

Short Name* — TFS Portfolio Grp

Long Name — TFS Portfolio Grp

Description — TFS Portfolio Grp

6. Click Save. The name displayed will be changed.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[Create Portfolio Group and Assign Members](#)

[Duplicate Portfolio Group](#)

[Delete Portfolio Group](#)

CHANGE HISTORY

Date	By	Changes
21-Jul-2017	Clarissa	Created.
15-Nov-2019	Lyra	Updated Screenshots.