Hide Spending Transactions

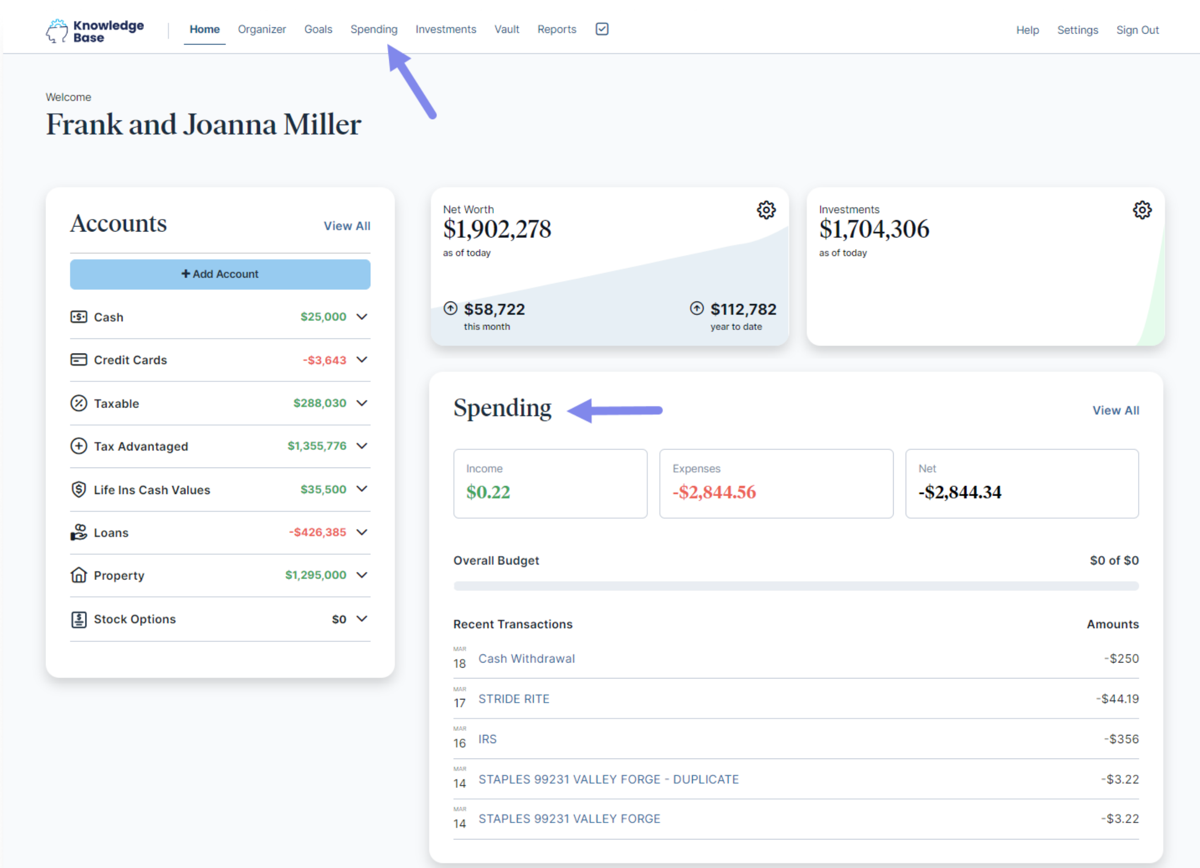
This User Guide demonstrates how to hide a spending transaction that comes from one of your connections.

Typically, users hide spending transactions when they don't want the transaction included in their monthly budget. For example, if a business spending transaction comes through but the user only wants personal spending to be tracked, or if there is a duplicate spending transaction, they may choose to hide it.

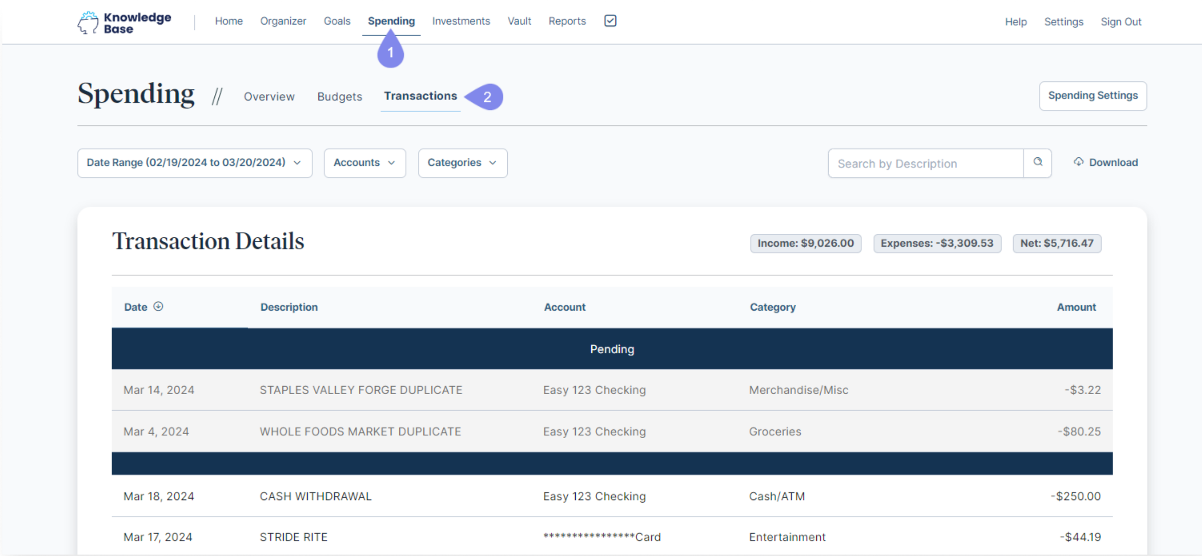
Note

- Hidden transactions are not included in the Overview or Budget tabs
- Hidden transactions are not deleted
- If the transaction is split, you can hide a portion of it

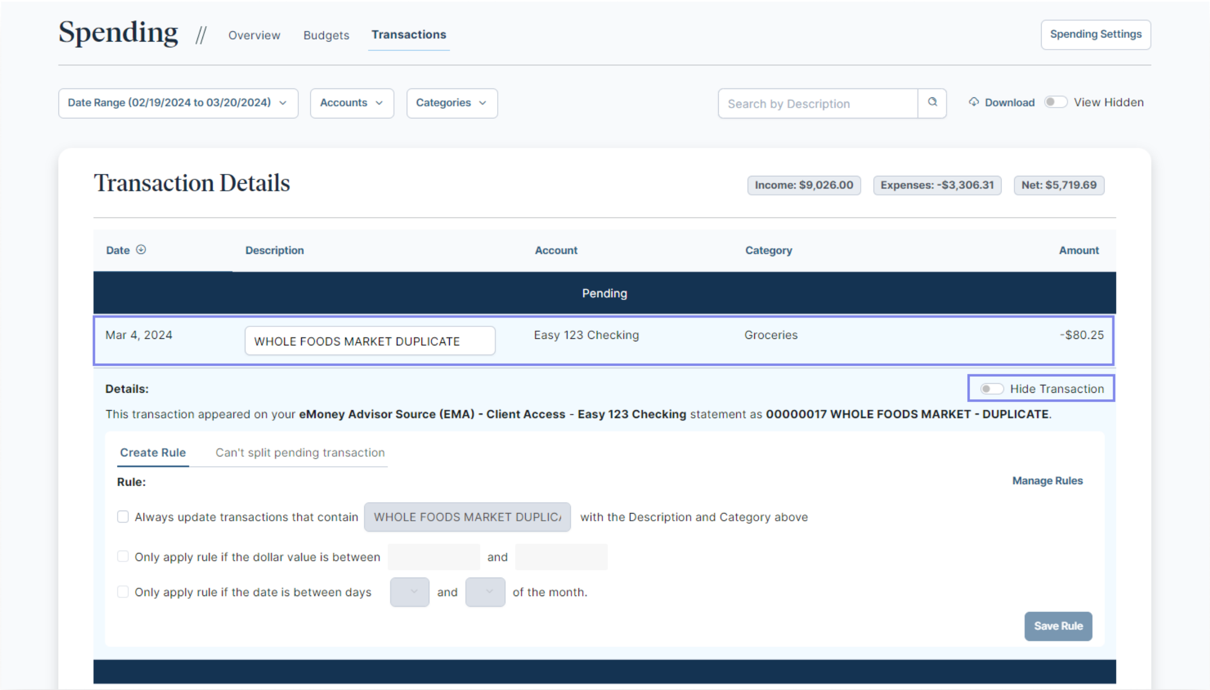
1. From the Home page, click Spending on the top navigation bar or from the Spending card.



2. From the Spending tab, click Transactions.

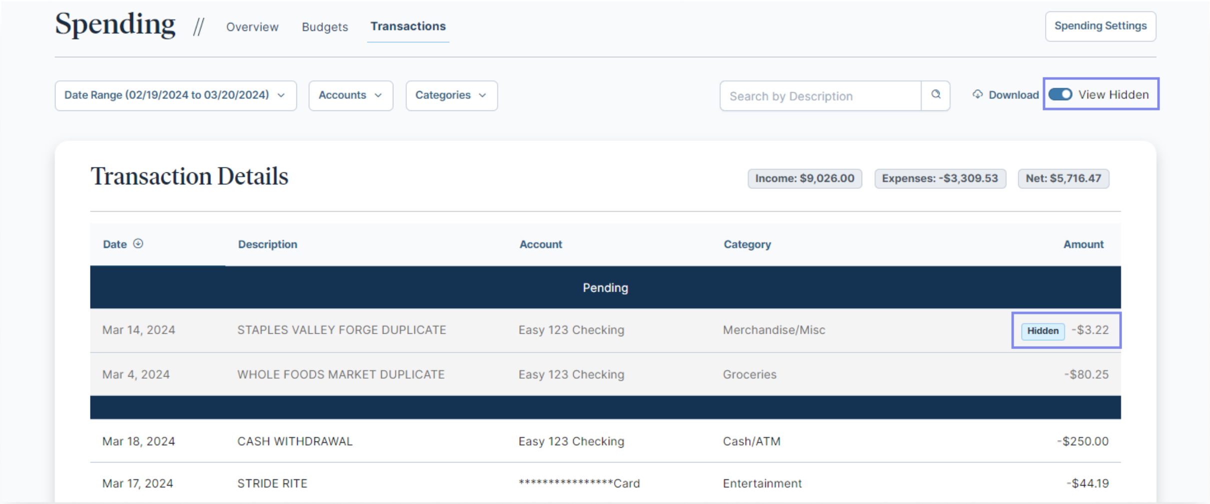


3. Locate the transaction line item and click the transaction description or the row itself. This will expand the transaction details. Within the transaction details, toggle the switch beside Hide Transaction.



4. To view all previously hidden transactions, toggle the switch beside View Hidden. Note that this toggle will not appear on the screen if you do not have any transactions currently hidden.

   Hidden transactions will populate with a blue banner titled Hidden next to the dollar amount on the right-hand side.



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5. To unhide a transaction, click into the transaction that is currently hidden and toggle the switch next to Hide Transaction.