

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.

Knowledge Base | Home | Organizer | Goals | Spending | Investments | Vault | Reports | Help | Settings | Sign Out

Welcome
Frank and Joanna Miller

Accounts View All

+ Add Account

- Cash \$25,000
- Credit Cards -\$3,643
- Taxable \$288,030
- Tax Advantaged \$1,355,776
- Life Ins Cash Values \$35,500
- Loans -\$426,385
- Property \$1,295,000
- Stock Options \$0

Net Worth \$1,902,278 as of today

\$58,722 this month | \$112,782 year to date

Investments \$1,704,306 as of today

Spending View All

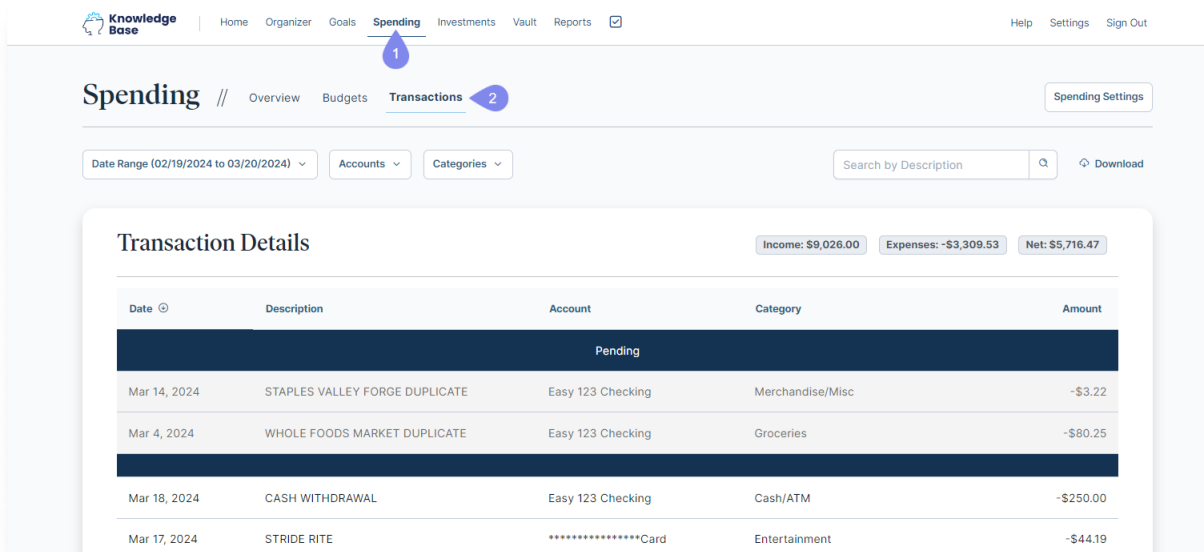
Income: \$0.22 | Expenses: -\$2,844.56 | Net: -\$2,844.34

Overall Budget: \$0 of \$0

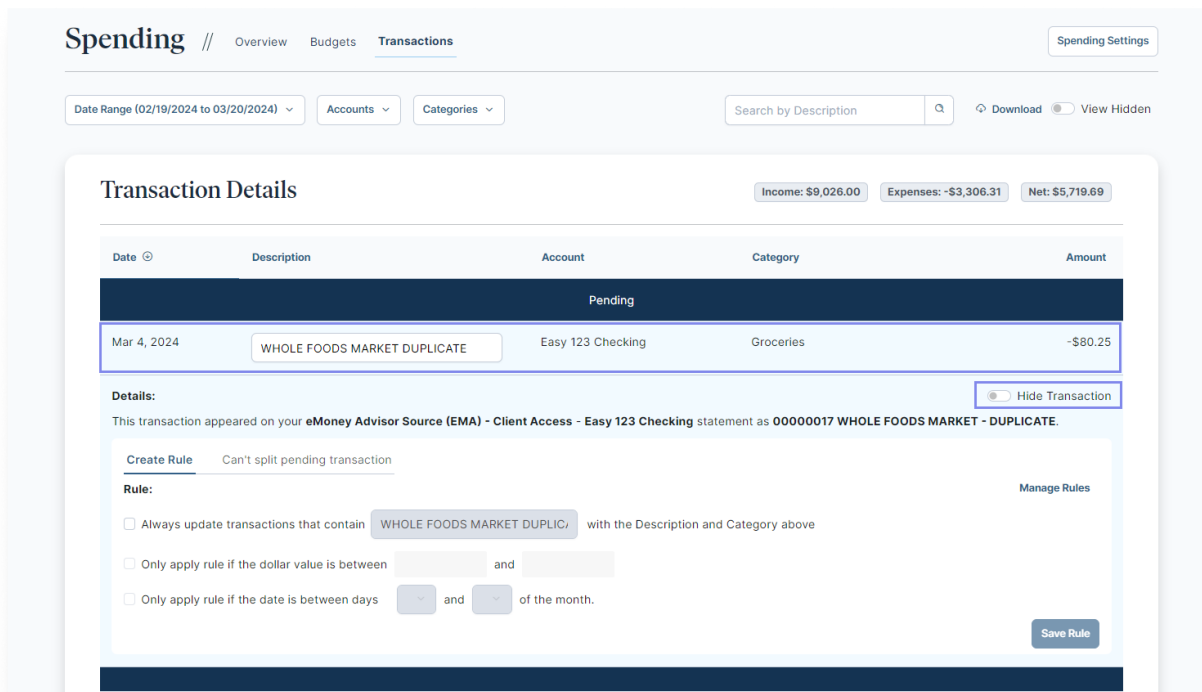
Recent Transactions

DATE	Amounts
MAR 18	Cash Withdrawal -\$250
MAR 17	STRIDE RITE -\$44.19
MAR 16	IRS -\$356
MAR 14	STAPLES 99231 VALLEY FORGE - DUPLICATE -\$3.22
MAR 14	STAPLES 99231 VALLEY FORGE -\$3.22

2. From the Spending tab, click Transactions.

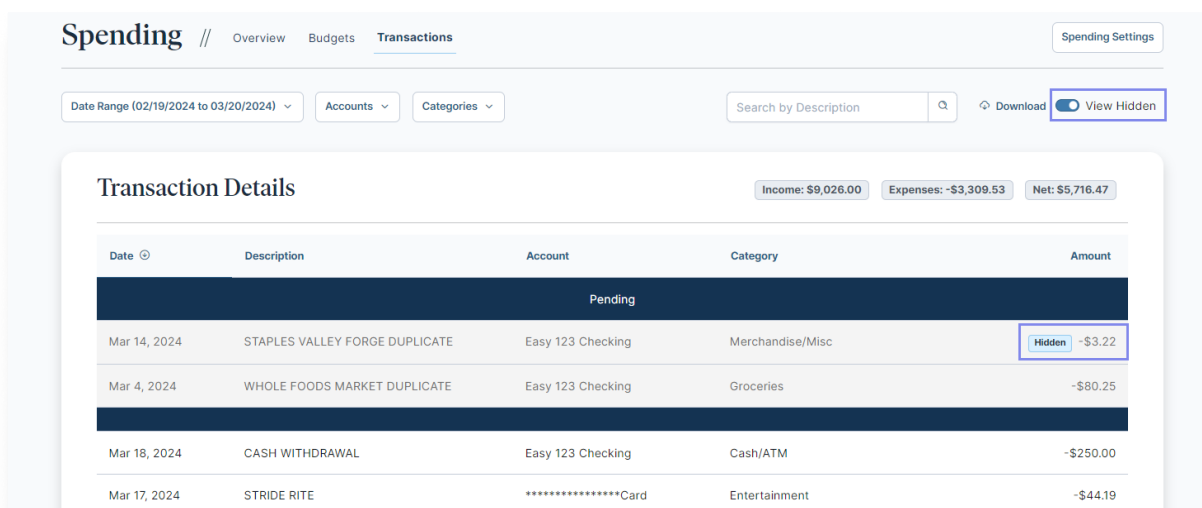


3. Locate the transaction line item and click the transaction description or the row itself. This will expand the transaction details. Within the transaction details, toggle the switch beside Hide Transaction.



- 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.



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

The screenshot shows the 'Spending' application interface. At the top, there are navigation tabs for 'Overview', 'Budgets', and 'Transactions', with 'Transactions' selected. A 'Spending Settings' button is in the top right. Below the navigation, there are filters for 'Date Range (02/19/2024 to 03/20/2024)', 'Accounts', and 'Categories'. A search bar labeled 'Search by Description' and a 'Download' button with a 'View Hidden' toggle are also present.

The main content area is titled 'Transaction Details' and shows summary statistics: 'Income: \$9,026.00', 'Expenses: -\$3,309.53', and 'Net: \$5,716.47'. Below this is a table with columns for 'Date', 'Description', 'Account', 'Category', and 'Amount'. A transaction is listed with the date 'Mar 14, 2024', description 'STAPLES VALLEY FORGE DUPLICATE', account 'Easy 123 Checking', category 'Merchandise/Misc', and amount '-\$3.22'. The transaction is marked as 'Hidden'.

Below the table, there is a 'Details' section. A blue arrow points to a 'Hide Transaction' toggle switch, which is currently turned on. Below the toggle, it says 'This transaction appeared on your eMoney Advisor Source (EMA) - Client Access - Easy 123 Checking statement as STAPLES 99231 VALLEY FORGE - DUPLICATE.' There is also a 'Create Rule' section with a 'Rule:' list and a 'Save Rule' button.