Hide Spending Transactions

This user guide will demonstrate 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 to be 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**.

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View All
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2. From the Spending tab, click Transactions.

Overview Budg	ets Transactions			Spending Settings
Date range	Description	Accounts	Categories	
Last 30 days 🔹	Type to Search Q	Type to Search Q	Type to Search Q	Export results
Date 😄	Description 🗢	Account 🗢	Category 🗢	Amount 🗢
Sep 08, 2019	CASH WITHDRAWAL	Easy 123 Checkin	ig Cash/ATM	-\$250.00
Sep 07, 2019	STRIDE RITE	Credit Card	Clothing	-\$44.19
Sep 06, 2019	IRS	Easy 123 Checkin	ig Federal Tax	-\$356.00
Sep 04, 2019	STAPLES VALLEY FORGE	Credit Card	Business	-\$56.55
Sep 04, 2019	STAPLES VALLEY FORGE	Easy 123 Checkin	g Business	-\$3.22
Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checkin	ig Sports & Hobbies	-\$3.22

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3. Locate the transaction line item and click the **transaction description** or the **row** itself. This will expand the transaction details.

4. Within the transaction details, toggle the switch beside **Hide transaction**.



5. To view all previously hidden transactions, toggle the switch beside **View Hidden Transactions**. Hidden transaction will populate with a blue banner titled Hidden above the dollar amount on the right-hand side.

Overview Budge	ts Transactions				Spending Settings
Date range	Description Type to Search ansactions	Accounts Type to Search	Categories Type to Search	٩	Export results
Date \$	Description \$	Account ≑ Easy 123 Check	Cate	gory ≑ h/ATM	Amount 🖨
Sep 07, 2019	STRIDE RITE	Credit Card	Cloti	hing	-\$44.19
Sep 06, 2019 Sep 04, 2019	IRS STAPLES VALLEY FORGE	Easy 123 Check Credit Card	ing Fede	eral Tax iness	-\$356.00 -\$56.55
Sep 04, 2019	STAPLES VALLEY FORGE	Easy 123 Check	ing Hom	e Supplies	-\$3.22
Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Check	ing Spor	rts & Hobbies	-\$3.22