

In this user guide, we will show how to hide any duplicate transactions which may pull through connections.

With this feature, you will be able to:

- Hide transactions.
- Show all previously hidden transactions by filtering the transaction list.
- Access this feature via your Mobile site.

Notes:

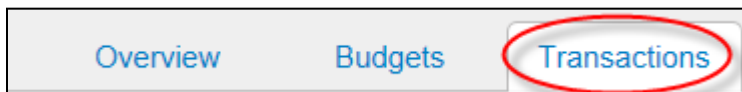
- When a transaction is hidden, the transaction is NOT deleted.
- A user can hide individual parts of a split transaction
- If a user splits a transaction that is hidden, the split section will remain unhidden

1. To mark a transaction as hidden:

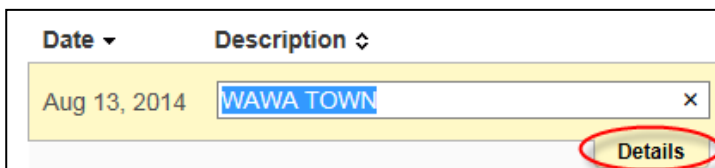
a. Click the **Spending** tab.



b. Click the Transactions tab.




c. Choose a transaction, and click on the **Details** link.





d. Check the **Hide this transaction** box. Click **Done**.

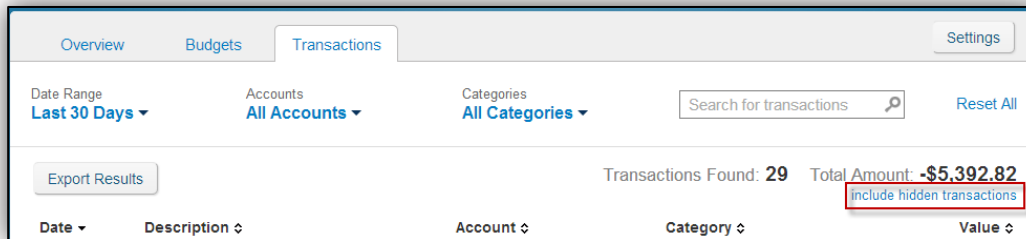


## 1 | Hiding Duplicate Transactions

2. To show all previously hidden transactions by filtering the transaction list:
  - a. When a transaction is marked as hidden, the transaction will appear with the following icon next to the description section 

Date ▾	Description ▾	Account ▾	Category ▾	Value ▾
Jun 15, 2014	 WAWA TOWN2	Fidelity Brokerage	Food	-\$80.00
Jun 14, 2014	 CASH WITHDRAWAL 1	Fidelity Brokerage	Cash/ATM	-\$250.00
Jun 14, 2014	CASH WITHDRAWAL 2w	Easy 123 Checking	Fees & Charges	-\$250.00
Jun 13, 2014	STRIDE RITE	Platinum Credit Card	Unclassified	-\$44.19
Jun 12, 2014	sdfasdf 3	Fidelity Brokerage	Unclassified	-\$356.00

- b. To include hidden transactions in the Transactions list, click the **include hidden transactions** link located under the Total Amount.



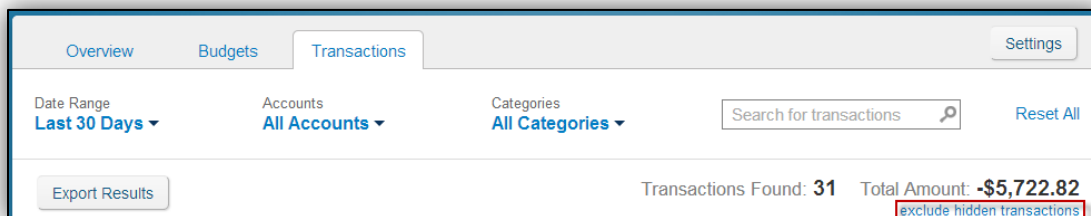
Overview Budgets Transactions Settings

Date Range: Last 30 Days ▾ Accounts: All Accounts ▾ Categories: All Categories ▾ Search for transactions 🔍 Reset All

Export Results Transactions Found: 29 Total Amount: -\$5,392.82 [include hidden transactions](#)

Date ▾ Description ▾ Account ▾ Category ▾ Value ▾

- c. To exclude the hidden transactions (that were previously included), click the **exclude hidden transactions** link located under the Total Amount.



Overview Budgets Transactions Settings

Date Range: Last 30 Days ▾ Accounts: All Accounts ▾ Categories: All Categories ▾ Search for transactions 🔍 Reset All

Export Results Transactions Found: 31 Total Amount: -\$5,722.82 [exclude hidden transactions](#)

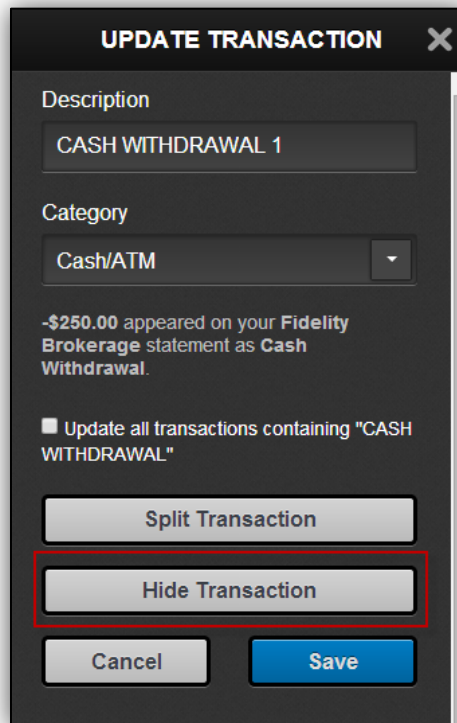
Date ▾ Description ▾ Account ▾ Category ▾ Value ▾

## 2 | Hiding Duplicate Transactions

Notes:

- Hidden transactions will not be included in the Budgets or Overview sub-tabs.
- The Total Amount will reflect the total amount of the transactions on the page.
  - If hidden transactions are excluded, the amount will be different than if those hidden transactions are included.

3. To mark a transaction as a duplicate through our mobile site.
  - a. To mark a transaction as a duplicate, navigate to **Transactions** from the Home Page.
  - b. Tap on the transaction to be marked as a duplicate – this will take you to the **Update Transaction** page.
  - c. Click the button titled **Hide Transaction**.



**UPDATE TRANSACTION** ✕

Description  
CASH WITHDRAWAL 1

Category  
Cash/ATM

-\$250.00 appeared on your Fidelity Brokerage statement as Cash Withdrawal.

Update all transactions containing "CASH WITHDRAWAL"

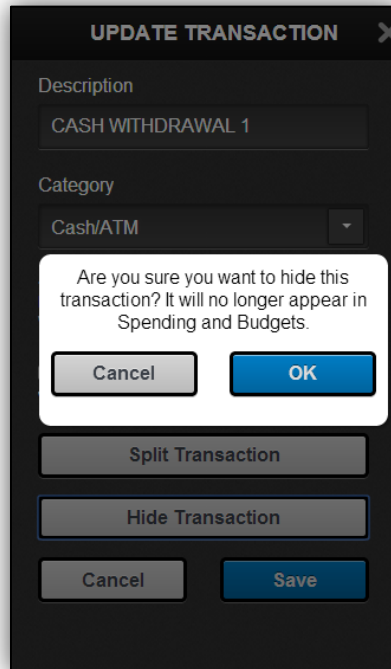
Split Transaction

Hide Transaction

Cancel Save

### 3 | Hiding Duplicate Transactions

- d. After tapping the button to hide a transaction, a confirmation message will appear with the following text  
Are you sure you want to hide this transaction? Click OK to hide. It will no longer appear in **Spending** and **Budgets**.



UPDATE TRANSACTION

Description  
CASH WITHDRAWAL 1

Category  
Cash/ATM

Are you sure you want to hide this transaction? It will no longer appear in Spending and Budgets.

Cancel OK

Split Transaction

Hide Transaction

Cancel Save

- e. On the main **Transactions** page, duplicate transactions will be marked with a:

