

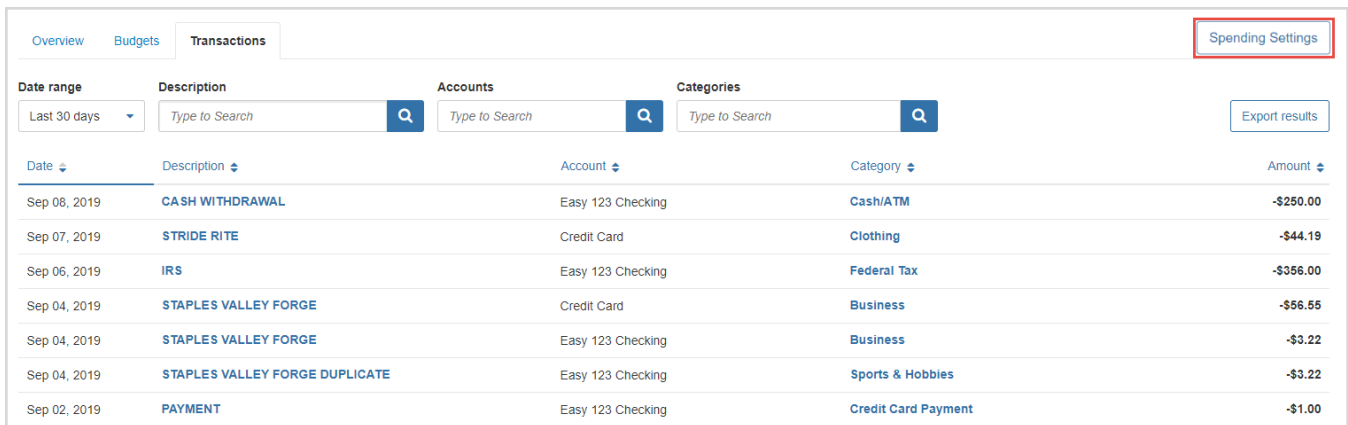
Customize Your Transactions

This user guide will walk you through the advanced transactions related tools available in your eMoney Financial Dashboard including:

- Settings: Categories – Create a Subcategory
- Transactions: Create a Categorization Rule
- Transactions: Hide a Transaction
- Transactions: Export Transactions
- Settings: Manage Rules

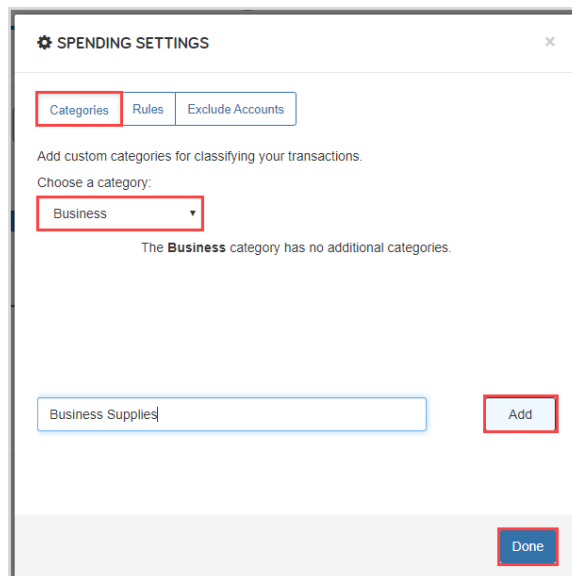
Settings: Categories – Create a Subcategory

1. You can create new spending sub-categories by clicking the Spending tab then **Spending Settings** at the top of the page.



Date	Description	Account	Category	Amount
Sep 08, 2019	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
Sep 07, 2019	STRIDE RITE	Credit Card	Clothing	-\$44.19
Sep 06, 2019	IRS	Easy 123 Checking	Federal Tax	-\$356.00
Sep 04, 2019	STAPLES VALLEY FORGE	Credit Card	Business	-\$56.55
Sep 04, 2019	STAPLES VALLEY FORGE	Easy 123 Checking	Business	-\$3.22
Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking	Sports & Hobbies	-\$3.22
Sep 02, 2019	PAYMENT	Easy 123 Checking	Credit Card Payment	-\$1.00

2. Next, select a parent category from the **Choose a category** drop-down menu, type your desired sub- category in the free-form field, click **Add** then **Done**. Now, when you re-categorize transactions, your custom sub-category will be available to use!



Transactions: Create a Categorization Rule

1. Navigate to the Spending > Transactions tab. To make changes to the Category provided for the transaction, click the **transaction row** and select a new category from the drop-down by clicking on the existing **category** in blue.

Date	Description	Account	Category	Amount
Sep 04, 2019	STAPLES VALLEY FORGE	Easy 123 Checking	Business	-\$3.22
Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking		
Sep 02, 2019	PAYMENT	Easy 123 Checking		-\$1.00
Sep 01, 2019	WAWA TOWN	Credit Card		-\$3.99
Aug 31, 2019	OVERDRAFT PROTECTION	Easy 123 Checking		-\$75.00
Aug 29, 2019	COLLEGEVILLE WEGMANS	Credit Card		-\$111.42

2. To apply your edits to all similar transactions using a **rule**, check the **box** under **Rule**. Click **Save Rule**.

Date	Description	Account	Category	Amount
Sep 04, 2019	STAPLES VALLEY FORGE	Easy 123 Checking	Home Supplies	-\$3.22

Transactions: Hide a Transaction

1. To hide a transaction, click the **transaction row**, then click the **Hide Transaction** toggle.

The screenshot shows the 'Transactions' tab in the eMoney Financial Dashboard. At the top right, there are tabs for 'Overview', 'Budgets', and 'Transactions', with 'Transactions' being the active tab. Below the tabs are filters for 'Last 90 days', 'Description', 'Accounts', and 'Categories'. On the right side, there are summary statistics: 'Income \$41,456.90', 'Expenses -\$20,820.49', and 'Net Total \$20,636.41'. The main table lists transactions with columns for Date, Description, Account, Category, and Amount. The transaction for 'May 13, 2020' with description 'STAPLES VALLEY FORGE' is highlighted in blue. Below this row, a 'Details' panel is open, showing the transaction details and a 'Hide Transaction' toggle switch, which is highlighted with a red box. The toggle is currently turned off.

Date	Description	Account	Category	Amount
Pending				
May 13, 2020	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking	Sports & Hobbies	-\$3.22
May 03, 2020	WHOLE FOODS MARKET DUPLICATE	Easy 123 Checking	Groceries	-\$80.25
May 17, 2020	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
May 16, 2020	STRIDE RITE	*****Card	Shopping	-\$44.19
May 15, 2020	IRS	Easy 123 Checking	Federal Tax	-\$356.00
May 13, 2020	STAPLES VALLEY FORGE	*****Card	Business	-\$56.55

Please Note: When hiding a transaction:

- The transaction will no longer be visible within the Transactions tab unless you click the **View Hidden** toggle at the top of your Transactions page. When viewing hidden transactions, note the amounts of these transactions will not be included in totals.
- The hidden transaction amount will deduct from the **Income**, **Expenses**, and **Net Total** numbers on the top right of the Transactions tab.
- The hidden transaction is no longer accounted for on the **Overview** tab or the **Budget** tab.

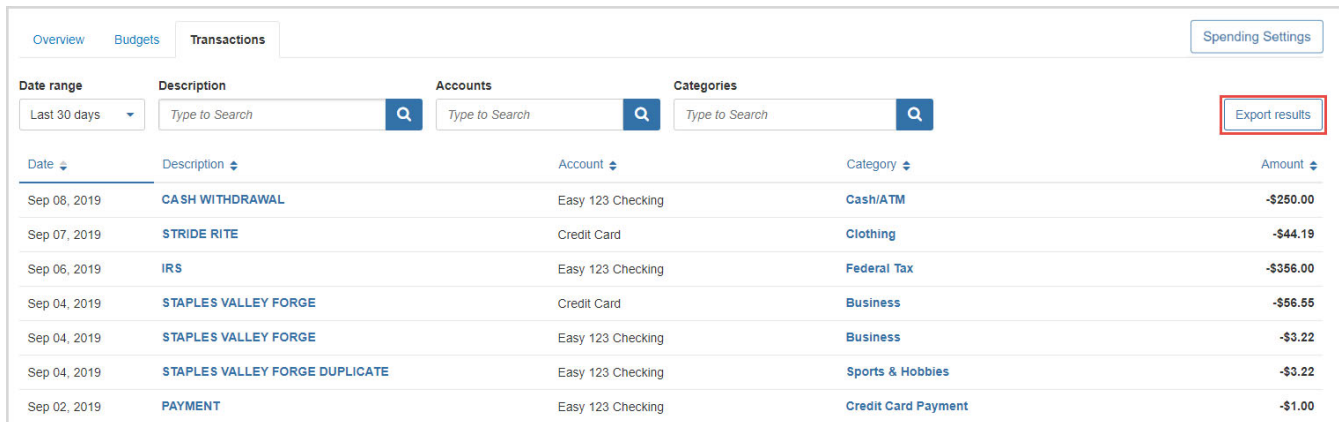
2. To view all previously hidden transactions, toggle the switch beside **View Hidden Transactions**.

The screenshot shows the 'Transactions' tab in the eMoney Financial Dashboard. At the top right, there are tabs for 'Overview', 'Budgets', and 'Transactions', with 'Transactions' being the active tab. Below the tabs are filters for 'Date range', 'Description', 'Accounts', and 'Categories'. On the right side, there is an 'Export results' button. Below the filters, there is a 'View Hidden Transactions' toggle switch, which is turned on and highlighted with a red box. The main table lists transactions with columns for Date, Description, Account, Category, and Amount. The transaction for 'Sep 04, 2019' with description 'STAPLES VALLEY FORGE DUPLICATE' is highlighted in blue, and its amount '-\$3.22' is also highlighted with a red box.

Date	Description	Account	Category	Amount
Sep 06, 2019	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
Sep 07, 2019	STRIDE RITE	Credit Card	Clothing	-\$44.19
Sep 05, 2019	IRS	Easy 123 Checking	Federal Tax	-\$356.00
Sep 04, 2019	STAPLES VALLEY FORGE	Credit Card	Business	-\$56.55
Sep 04, 2019	STAPLES VALLEY FORGE	Easy 123 Checking	Home Supplies	-\$3.22
Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking	Sports & Hobbies	-\$3.22

Transactions: Export Transactions

1. To Export transactions, click the **Export Results** button to export the transaction table to a .CSV format.

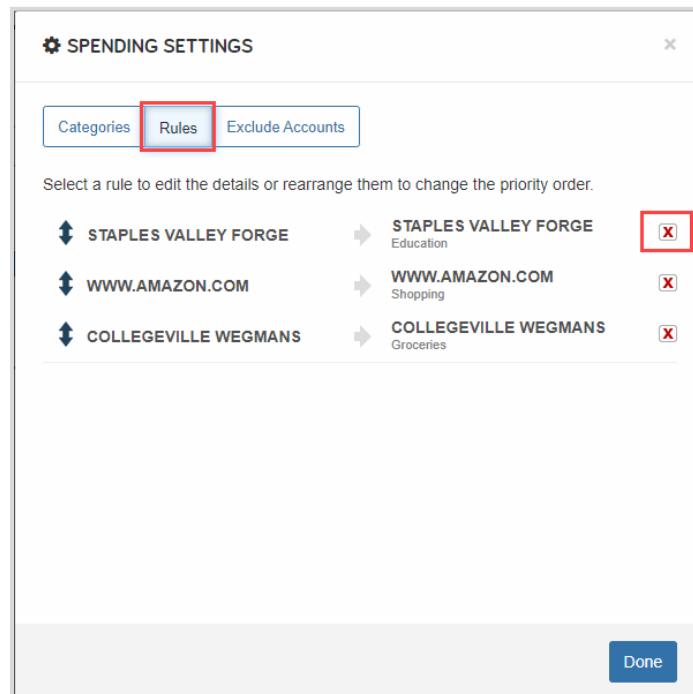


The screenshot shows the 'Transactions' tab in the eMoney dashboard. At the top right, there is a 'Spending Settings' button. Below it, there are search filters for 'Date range' (set to 'Last 30 days'), 'Description', 'Accounts', and 'Categories'. The 'Export results' button is highlighted with a red box. Below the filters is a table of transactions with columns for Date, Description, Account, Category, and Amount.

Date	Description	Account	Category	Amount
Sep 08, 2019	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
Sep 07, 2019	STRIDE RITE	Credit Card	Clothing	-\$44.19
Sep 06, 2019	IRS	Easy 123 Checking	Federal Tax	-\$356.00
Sep 04, 2019	STAPLES VALLEY FORGE	Credit Card	Business	-\$56.55
Sep 04, 2019	STAPLES VALLEY FORGE	Easy 123 Checking	Business	-\$3.22
Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking	Sports & Hobbies	-\$3.22
Sep 02, 2019	PAYMENT	Easy 123 Checking	Credit Card Payment	-\$1.00

Spending Settings: Manage Rules

1. The **Rules** tab allows you edit the details of a rule, rearrange the priority, or delete a rule. To delete a rule, click the **X** next to the rule(s) you want to delete, click **Yes** to acknowledge, then click **Done**.



Please Note: When deleting a rule, the system will *not* revert the affects that rule had on your past transactions but moving forward it will no longer apply the rule to your transactions.