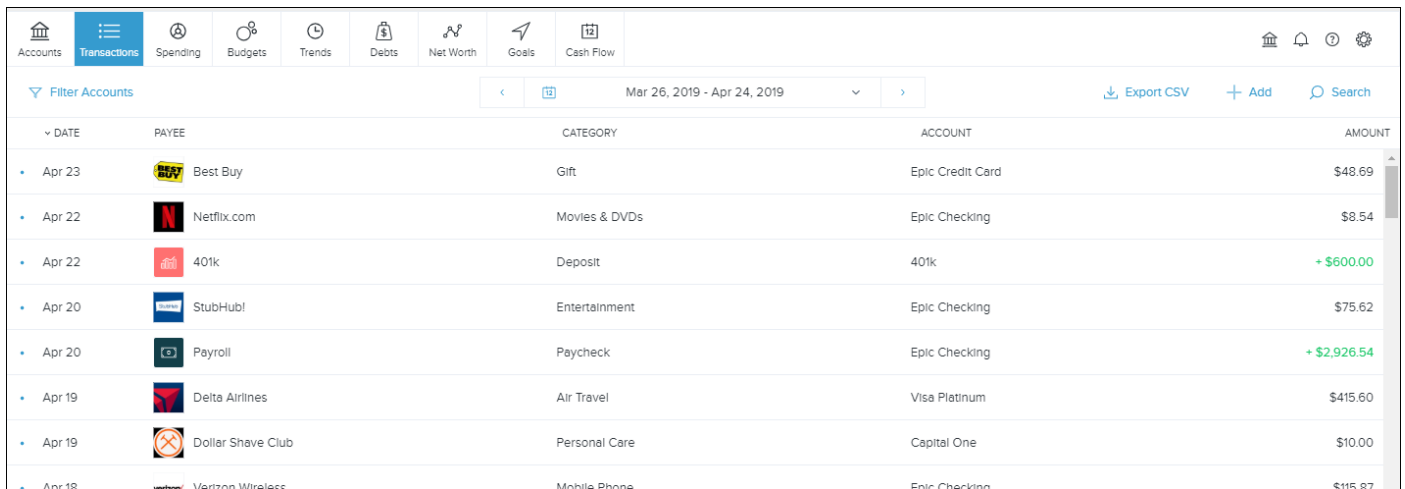


Transactions FAQs

Note: These FAQs are taken from the in-product help. If you're assisting users and you're in your own account so you can talk them through their issue more effectively, you can find this information there.

Overview

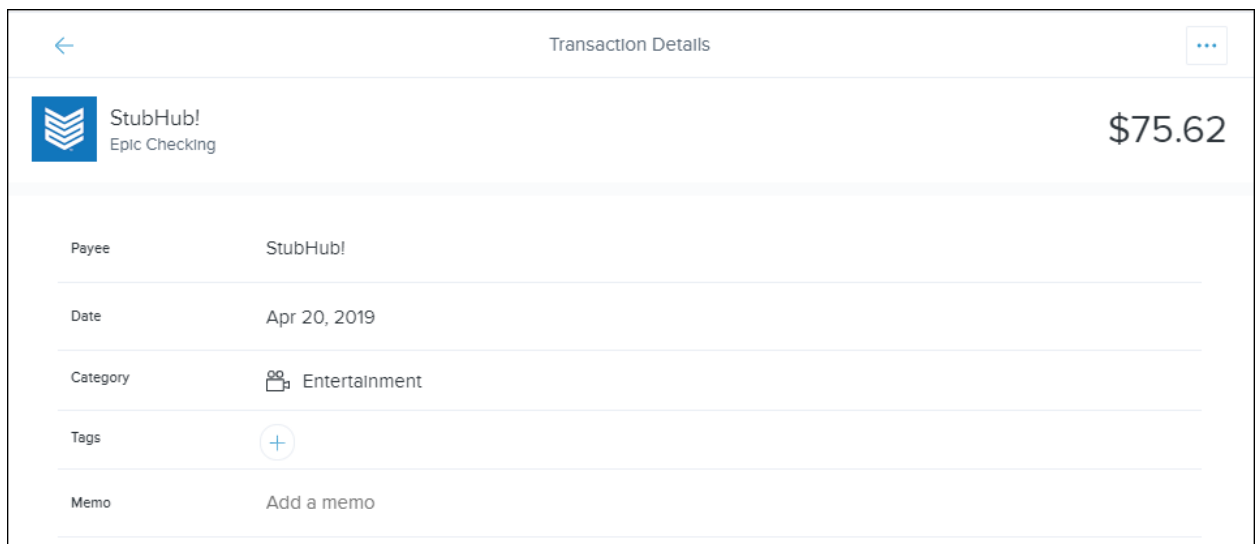
- Top Navigation Bar:
 - Filter Accounts to select specific accounts
 - Click the date to see a calendar or click the date dropdown to choose a specific range
 - Export your transactions to CSV to view in Excel, add a transaction (for manual accounts only), search by date, payee, category, account, amount, tags and memo.
- The blue dot at left indicates transactions that haven't been clicked on yet
- Green represents income
- Click a transaction to view details or to edit it



DATE	PAYEE	CATEGORY	ACCOUNT	AMOUNT
Apr 23	Best Buy	Gift	Epic Credit Card	\$48.69
Apr 22	Netflix.com	Movies & DVDs	Epic Checking	\$8.54
Apr 22	401k	Deposit	401k	+ \$600.00
Apr 20	StubHub!	Entertainment	Epic Checking	\$75.62
Apr 20	Payroll	Paycheck	Epic Checking	+ \$2,926.54
Apr 19	Delta Airlines	Air Travel	Visa Platinum	\$415.60
Apr 19	Dollar Shave Club	Personal Care	Capital One	\$10.00
Apr 18	Verizon Wireless	Mobile Phone	Epic Checking	\$115.87

Edit a Transaction

- Change the payee, date and category. Over time, the software will learn your categorization preferences.
- Click Category to select a different category, or add a new one. If you select a different category, a popup asks if you want to re-categorize all transactions from that Payee.
- Click Tags to create searchable labels such as business, vacation, taxes, holidays, etc.
- Click Memo to add details about this transaction.
- Triple Dot Menu:
 - Flag a transaction to call it out in the transactions list
 - Exclude Transaction to hide the transaction from all calculations including budgets, spending, net worth, etc. Once excluded, a button will appear allowing you to Re-Include the transaction.
 - Split Transaction to split a transaction in two or more. Use this if a single transaction contains at least two separate categories.
 - To edit a split, open this screen again and click the trash can. Then create a new split.
- Tip: Use your keyboard's arrow keys to quickly switch between transactions.



Transaction Details


←


StubHub!
Epic Checking

\$75.62

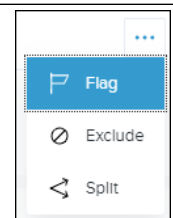
Payee StubHub!

Date Apr 20, 2019

Category  Entertainment

Tags 

Memo Add a memo



Seeing duplicate transactions?

Here are a few reasons you might be seeing duplicate transactions:

1. Your accounts have been added twice. If you see two of the same account, click one of them and then select Delete in the lower right corner.
2. You're seeing both the debit and the credit side of a single transfer. Transactions categorized as transfers don't show up in the spending wheel or in your budgets because they don't represent an increase or decrease in assets.
3. Your institution is duplicating certain transactions when it passes the data to us. Submit a support ticket to resolve this issue.

Not seeing all your transactions?

There could be a few different reasons for this, including:

1. A transaction might be so recent that it's still pending and hasn't shown up yet.
2. You've logged in for the first time. Only 90 days of transactions are pulled on the first log in.
3. It has been more than 30 days since you last logged in. In most cases each new log in only pulls 30 to 45 days' worth of transactions. To be sure all your transactions are included, we recommend logging in at least once every 30 days.

If these three reasons don't match what you're experiencing, submit a support ticket.

Pending transactions

- Pending Transactions appear in italics and a lighter color at the top of the transactions list. These are transactions that appear in your account but have not yet posted or been confirmed.
- Some of the data of a pending transaction may change once it's posted, such as the date, description, and even the amount.
- Pending Transactions can be permanently deleted by clicking Delete This Transaction.