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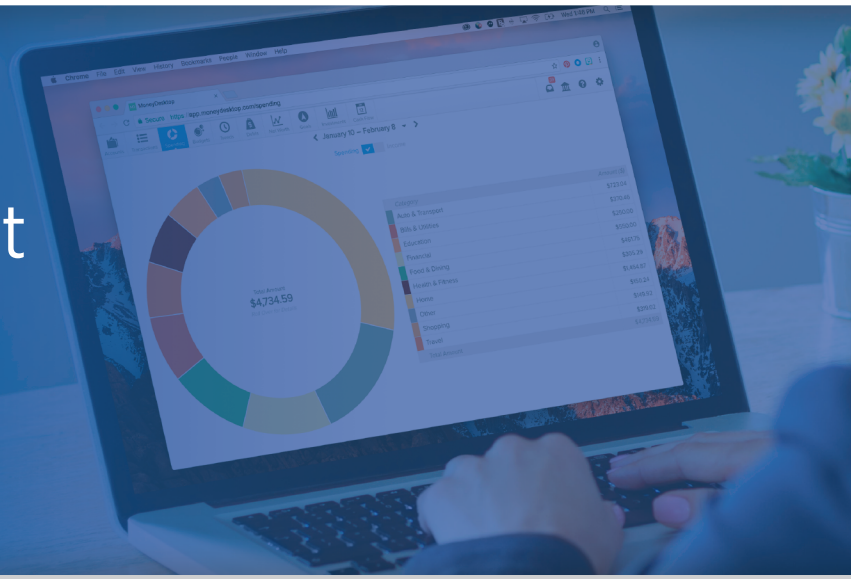
# Money Management
# **Transactions**



# Money Management - Transactions

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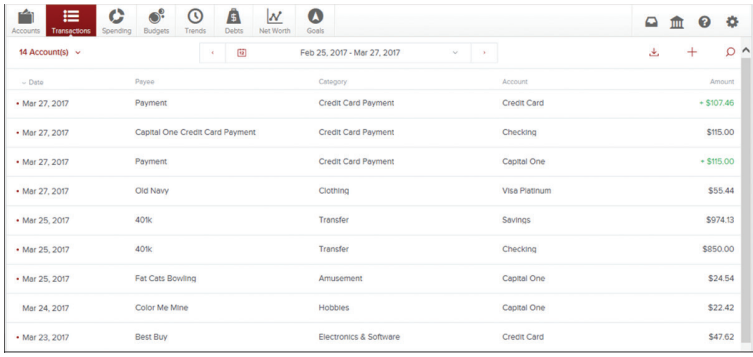
## Overview

- Select specific accounts in the top navigation bar. Click the date to see a calendar, or click the date dropdown to choose a specific range.
- In the top navigation bar you can also add a transaction (for manual accounts only), export your transactions to CSV to view in Excel, and filter transactions. Note that you can search by date, payee, category, account, amount, tags and memo.
- The NEW tag shows you transactions that haven't been clicked on yet.
- **Green** represents income.
- Click a transaction to view details or to edit it.



# Edit a Transaction

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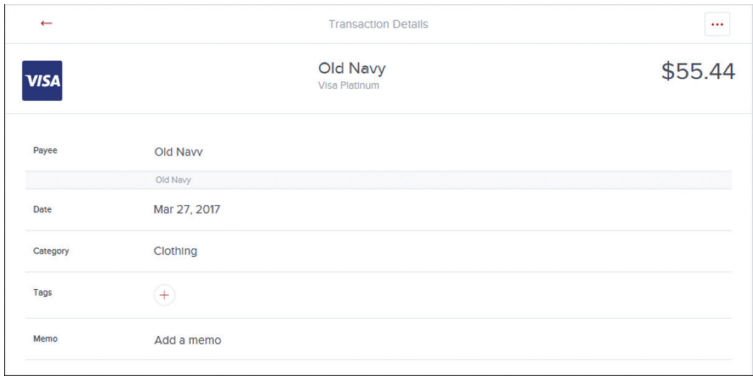
- You can change the payee, date and category. Over time, the software will learn your categorization preferences.
- Click Tags to create searchable labels such as vacation, taxes, holidays, etc.
- Click Memo to add details about this particular transaction.
- Mark a transaction as Business (B), Personal (P), or flag it to review later.
- Split Transaction splits 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 (not shown on the left). Then create a new split.
- Exclude Transaction will 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.




*Tip: Use the arrow keys to quickly switch between transactions.*

# Seeing duplicate transactions?

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## Here 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 request us to resolve this issue.

# Not seeing all your transactions?

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## 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

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- 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.