

Hiding Duplicate Spending Transactions

In this user guide, you will learn how to hide any duplicate spending transactions that may pull through your connections. With this added feature you will be able to hide transactions, view all previously hidden transactions through list filtering, and also utilize this functionality via your mobile site.

Hidden transactions are **NOT** included in the Overview or Budget tabs.

Please Note: When a transaction is hidden, the transaction is **NOT** deleted. If the transaction is split, you can hide a portion of it.

1. From the Home page, click **Spending**.

The screenshot shows the emX financial dashboard for Frank and Joanna McMiller. The navigation menu at the top includes Home, Organizer, Goals, Spending (highlighted with a red circle), Investments, Vault, Reports, and a notification bell. The main content area is divided into several sections:

- Accounts:** A list of accounts with their current balances: Cash (\$39,365), Credit Cards (\$0), Investments (\$1,010,463), Life Insurance (\$35,500), Loans (\$0), Property (\$1,295,000), and Stock Options (\$0).
- Net Worth:** A blue box showing a total net worth of \$2,380,328 as of today, with a \$109,876 increase this month and year-to-date.
- Investments:** A green box showing a total investment value of \$1,019,838 as of today, with a \$9,375 increase and a 0.93% change.
- Goals:** A section showing progress for Retirement (2019-2050, 27 of 32 years projected funding) and Education Expense (2017-2019, \$0 of \$0 projected funding).
- Spending:** A section with a 'View All' link and a horizontal bar chart showing spending trends.

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2. From the Spending tab, click **Transactions**.

The screenshot shows the emX interface with the 'Spending' tab selected. The 'Transactions' sub-tab is circled in red. Below the navigation, there are filters for Date Range (Last 30 Days), Accounts (All Accounts), and Categories (All Categories). A search bar and a 'Reset All' button are also present. The main area displays a table of transactions with columns for Date, Description, Account, Category, and Value. The total amount is \$8,542.23. A transaction for 'STAPLES VALLEY FORGE' is highlighted.

Date	Description	Account	Category	Value
Aug 20, 2017	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-\$250.00
Aug 19, 2017	STRIDE RITE	*****Card	Clothing	-\$44.19
Aug 18, 2017	IRS	Easy 123 Checking	Federal Tax	-\$356.00
Aug 16, 2017	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking	Sports & Hobbies	-\$3.22
Aug 16, 2017	STAPLES VALLEY FORGE	Easy 123 Checking	Business	-\$3.22
Aug 16, 2017	STAPLES VALLEY FORGE	*****Card	Business	-\$56.55
Aug 14, 2017	PAYMENT	Easy 123 Checking	Unclassified	-\$1.00
Aug 13, 2017	WAWA TOWN	*****Card	Fast Food & Convenience	-\$3.99
Aug 12, 2017	OVERDRAFT PROTECTION	Easy 123 Checking	Bank Fee	-\$75.00

3. Locate the transaction line item and click **Details**.

The screenshot shows a transaction detail view for 'STAPLES VALLEY FORGE' on May 04, 2016. The transaction is categorized as 'Business' and has a value of -\$3.22. A 'Details' button is circled in red.

4. Check the box beside **Hide this transaction**.

The screenshot shows the transaction detail view for 'STAPLES VALLEY FORGE' on May 04, 2016. The transaction is categorized as 'Business Supplies' and has a value of -\$3.22. The 'Hide this transaction' checkbox is checked, and the 'Done' button is circled in red.

Details: [Split Transaction](#)
Appeared on your eMoney Advisor Source (EMA) - Client Access - Easy 123 Checking statement as STAPLES 99231 VALLEY FORGE.

Rule: [Manage Rules](#)
 Always rename transactions containing **STAPLES VALLEY FORGE** in the description to **STAPLES VALLEY FORGE** and categorize as **Business**.
[Advanced](#)

Hide this transaction [Done](#)

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- To view all previously hidden transactions, click the **Include hidden transactions** link located under the Total Amount. Total amount shown reflects the total sum of transactions being viewed.

Overview Budgets Transactions Settings

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

Export Results Transactions Found: 54 Total Amount: **\$18,448.16**
[include hidden transactions](#)

Date	Description	Account	Category	Value
May 09, 2016	WAWA TOWN		Fast Food & Convenience	-\$80.00

- To exclude all hidden transactions, click the **Exclude hidden transactions** link 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: 56 Total Amount: **\$17,948.16**
[exclude hidden transactions](#)

Date	Description	Account	Category	Value
May 09, 2016	WAWA TOWN		Fast Food & Convenience	-\$80.00