

Hiding Duplicate 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 eMoney website interface. The navigation menu at the top includes Home, Organizer, Goals, **Spending** (highlighted with a red box), Investments, Vault, Reports, and a checkmark icon. On the right side of the navigation bar are links for Help, Settings, and Sign Out.

The main content area is titled "Welcome, Frank and Joanna Miller". It features several key sections:

- Accounts:** A list of account categories with their current balances:

Cash	\$54,568
Credit Cards	-\$4,918
Taxable	\$248,547
Tax Advantaged	\$894,810
Life Ins Cash Values	\$35,500
Loans	-\$426,385
Property	\$1,295,000
Stock Options	\$0
- Net Worth:** \$1,932,473 as of today. Changes: +\$96,906 this month, +\$308,255 year to date.
- Investments:** \$1,273,674¹ as of today. Change: +\$426² Change, +0.13%² Change.
- Goals:**
 - Retirement (2032 - 2068):** Projected Funding 37 of 37 years.
 - College for Lucas (2022 - 2025):** Projected Funding \$238,835 of \$238,835.
- Spending:** A summary bar showing:

\$0 Income	-\$717 Expenses	-\$717 Net
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2. From the Spending tab, click **Transactions**.

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

3. Locate the transaction line item and click the **transaction's row**.

Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking	Sports & Hobbies	-\$3.22
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4. Toggle the switch beside **Hide Transaction**.

Hide Transaction
 This transaction appeared on your eMoney Advisor Source (EMA) - Client Access - Easy 123 Checking statement as STAPLES 99231 VALLEY FORGE - DUPLICATE.

Create Rule Can't split pending transaction

Rule: Always update transactions that contain **STAPLES VALLEY FORGE DUPLICATE** with the Description and Category above

[Manage Rules](#) [Save Rule](#)

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

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	Home Supplies	-\$3.22
Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking	Sports & Hobbies	-\$3.22 Hidden