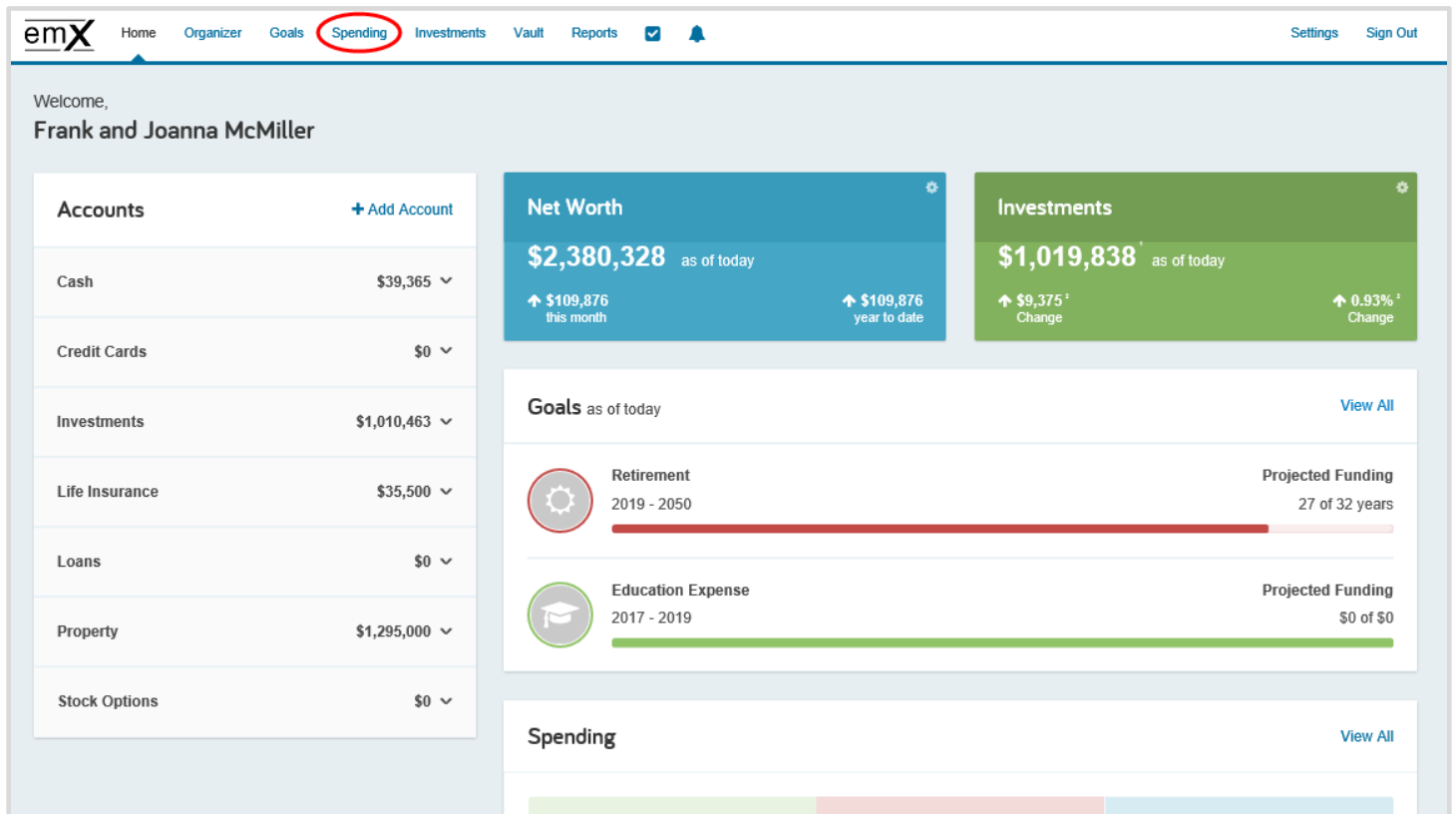


In this user guide, you will learn how to hide any duplicate spending transactions that may pull through your connections. With this added feature you will be able to hide transactions, view all previously hidden transactions through list filtering, and also utilize this functionality via your mobile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

- Accounts:** A list of account types 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 an increase of \$109,876 this month and \$109,876 year to date.
- Investments:** A green box showing a total investment value of \$1,019,838 as of today, with a change of \$9,375 and a 0.93% increase.
- Goals:** A section showing progress for Retirement (2019-2050) and Education Expense (2017-2019). Retirement is projected to be funded for 27 of 32 years, and Education Expense is projected to be funded for \$0 of \$0.
- Spending:** A section with a bar chart showing spending trends and a "View All" link.

Hiding Duplicate Spending Transactions

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

emX Home Organizer Goals Spending Investments Vault Reports Help Settings Sign Out

Overview Budgets **Transactions** Settings

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

Export Results Transactions Found: 34 Total Amount: \$8,542.23

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**.

May 04, 2016 STAPLES VALLEY FORGE x Easy 123 Checking Business -\$3.22

Details

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

May 04, 2016 STAPLES VALLEY FORGE Easy 123 Checking Business Supplies x -\$3.22

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**

Hiding Duplicate Spending Transactions

- 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.

The screenshot shows the 'Transactions' tab selected. The filters are: Date Range: Last 30 Days, Accounts: All Accounts, Categories: All Categories. A search bar is present with the text 'Search for transactions' and a magnifying glass icon. A 'Reset All' link is on the right. Below the filters, there is an 'Export Results' button. To the right of the export button, it says 'Transactions Found: 54' and 'Total Amount: \$18,448.16'. Underneath the total amount, there is a link 'include hidden transactions' which is circled in red. Below this, a table shows a transaction on May 09, 2016, for 'WAWA TOWN' with a value of -\$80.00.

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.

The screenshot shows the 'Transactions' tab selected. The filters are: Date Range: Last 30 Days, Accounts: All Accounts, Categories: All Categories. A search bar is present with the text 'Search for transactions' and a magnifying glass icon. A 'Reset All' link is on the right. Below the filters, there is an 'Export Results' button. To the right of the export button, it says 'Transactions Found: 56' and 'Total Amount: \$17,948.16'. Underneath the total amount, there is a link 'exclude hidden transactions'. Below this, a table shows a transaction on May 09, 2016, for 'WAWA TOWN' with a value of -\$80.00.

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