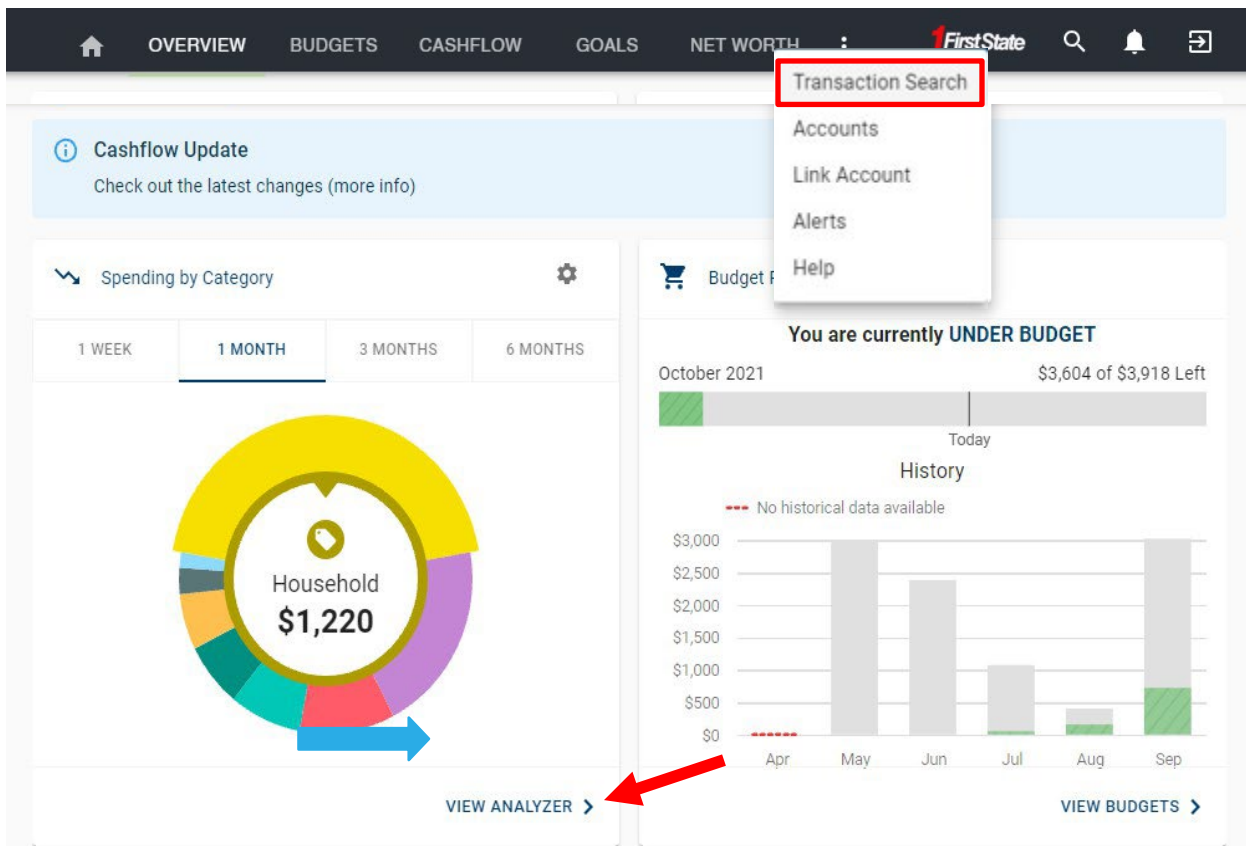
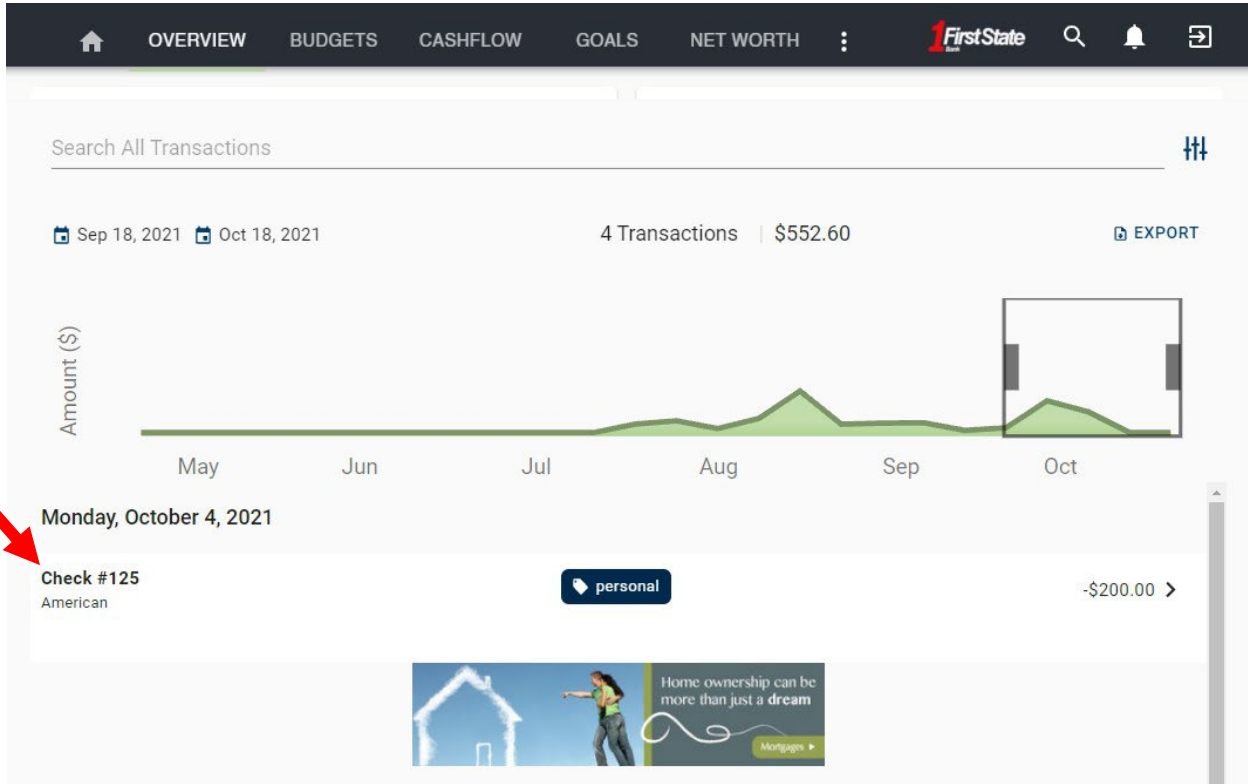


How to Tag a Transaction in Insights

- 1) Navigate to Insights and select the “View Analyzer” button on your dashboard; or choose the ellipsis (three dots) on the toolbar to select “Transaction Search”.



2) Locate and select the transaction you want to tag or modify.



The More You Know: Our Insights feature auto-tags all incoming transactions by analyzing each individual merchant and vendor. While we do our best, no one knows your spending habits better than you. We allow you to update and customize your transactions to your own needs.



- 3) On the “Edit Transaction” screen, you can modify the naming convention used to identify said transaction, update the “Category” or “Tag” assigned to one of your choice, and apply the tag and title adjustments to all similar transactions. When necessary, you may also use the “Split Tag” button to split the transaction among multiple categories. Lastly, this screen will allow you to delete/remove the transaction from Insights.

Edit Transaction ×

Oct 4, 2021 \$200.00

Name *
Check #125 Childcare

Appears as Check #125 on your American statement.

Apply this tag and title to all similar transactions
This tag rule will be applied on next refresh or login

Use **one regular tag** for the full value or **split tags** to apportion the amount.

[USE SPLIT TAG](#)

Have tags you don't use anymore? [Click Here](#) to delete your old tags.

[DELETE](#) [CANCEL](#) [SAVE](#)

- 4) Click Save.