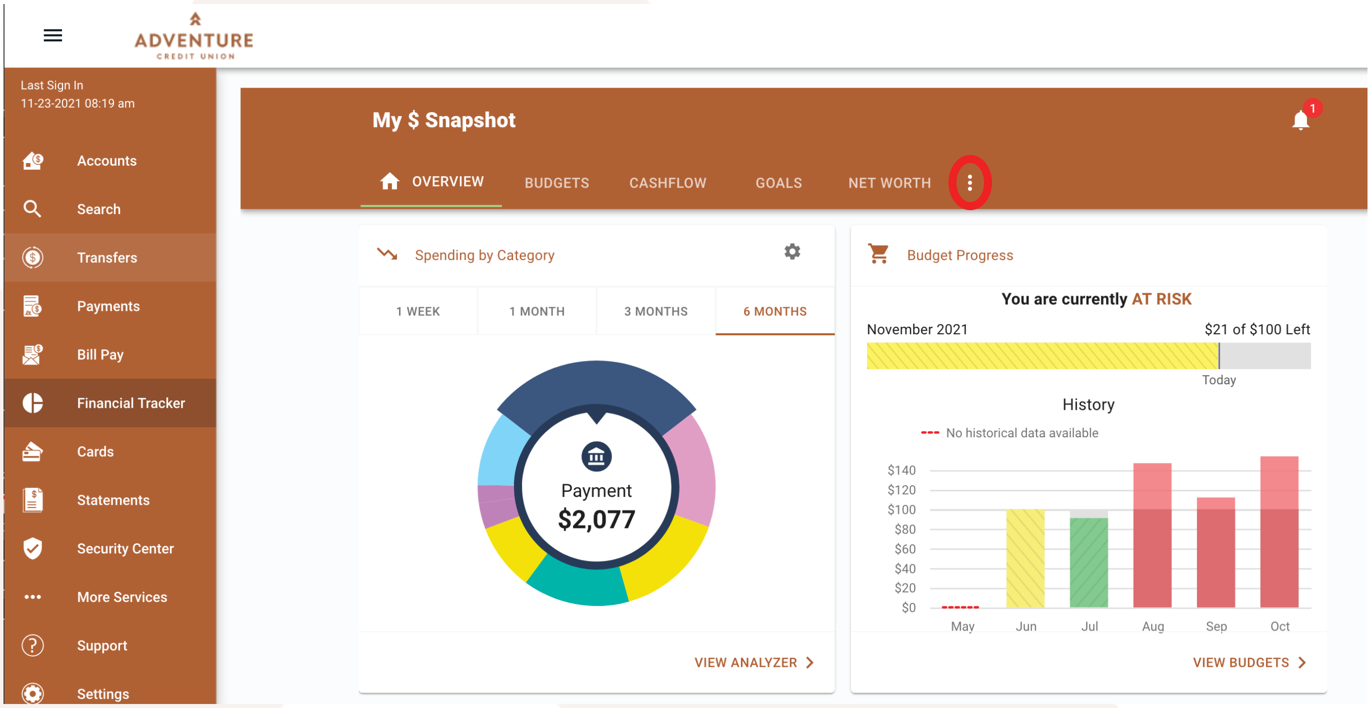
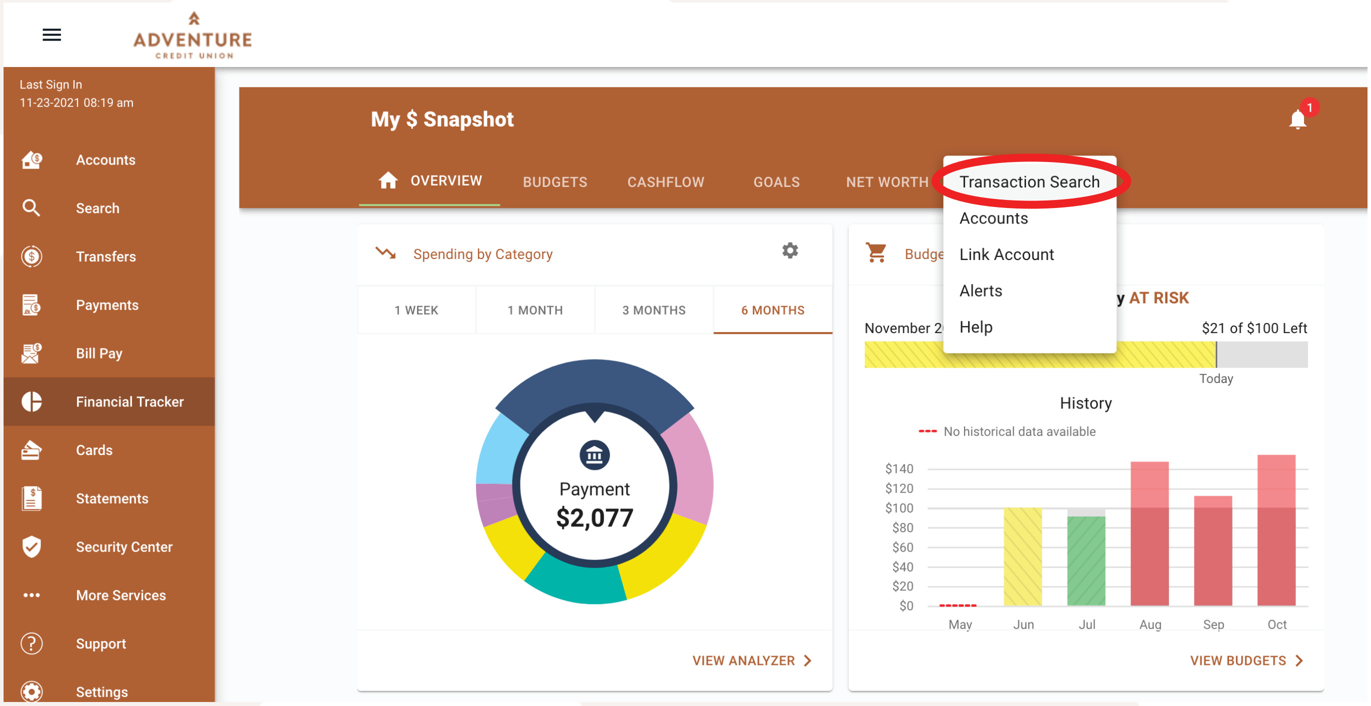
How to tag purchases in My $ Snapshot

When in My $ Snapshot click on the 3 dots in the top menu bar as show in the image below.

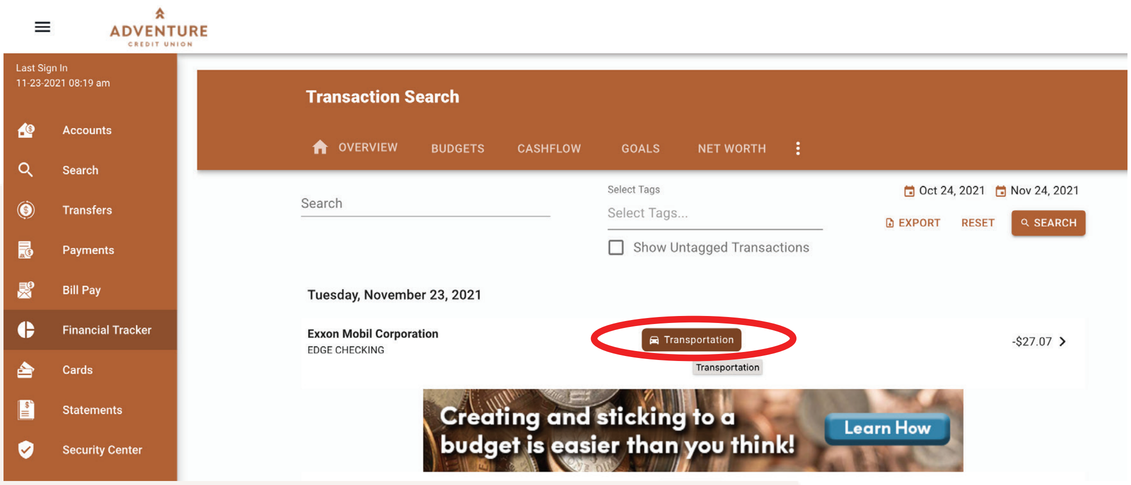


From that drop down menu select the "Transaction Search" option. This will open a screen with all of your transactions.

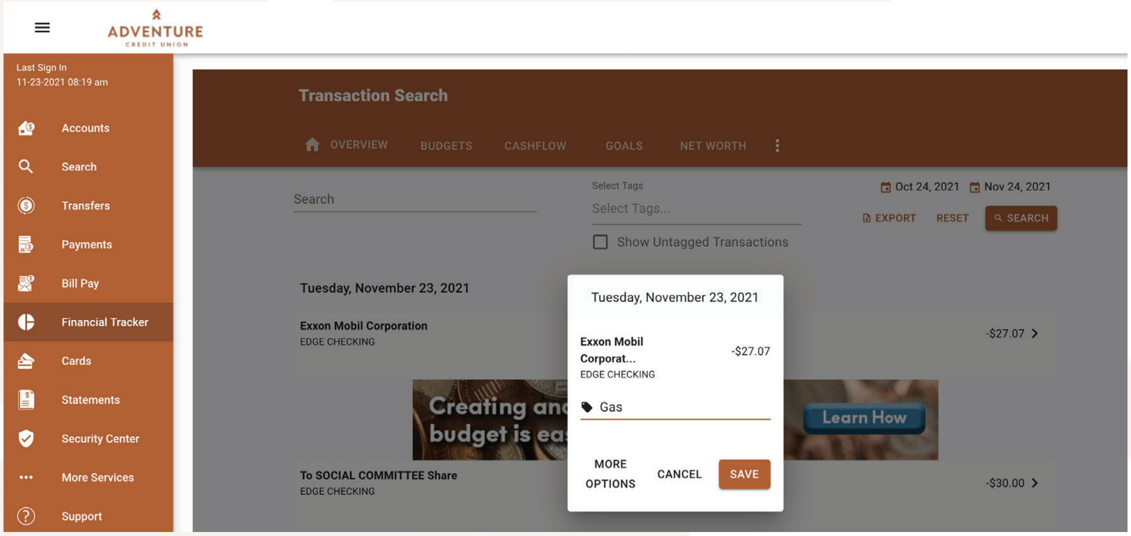


From here there are two ways to edit/add the tags.

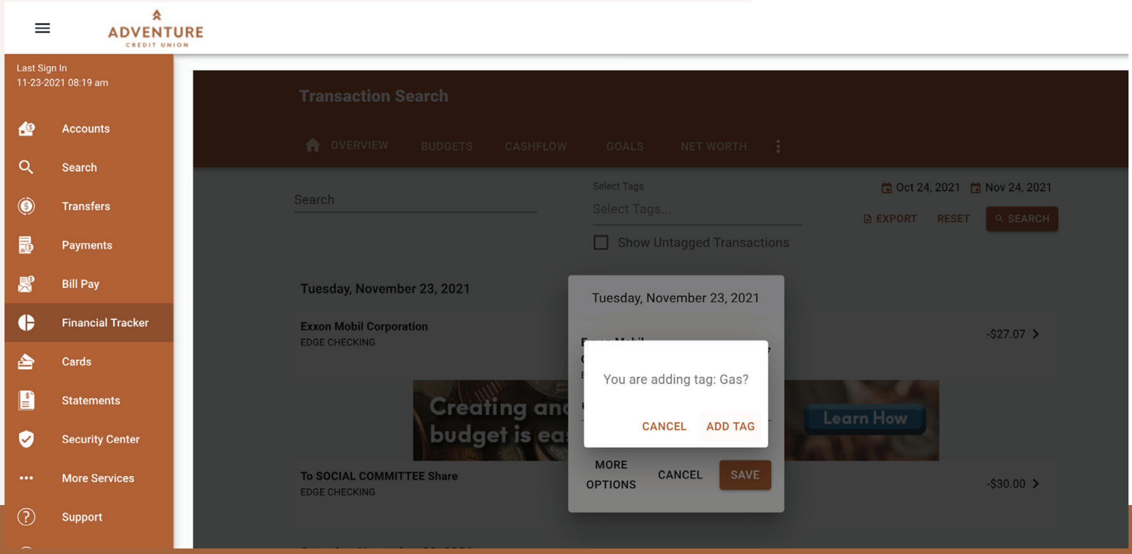
Most transactions are assigned a tag automatically. However, the tag may not be correct. To edit a tag, click on the copper rectangle as shown below.



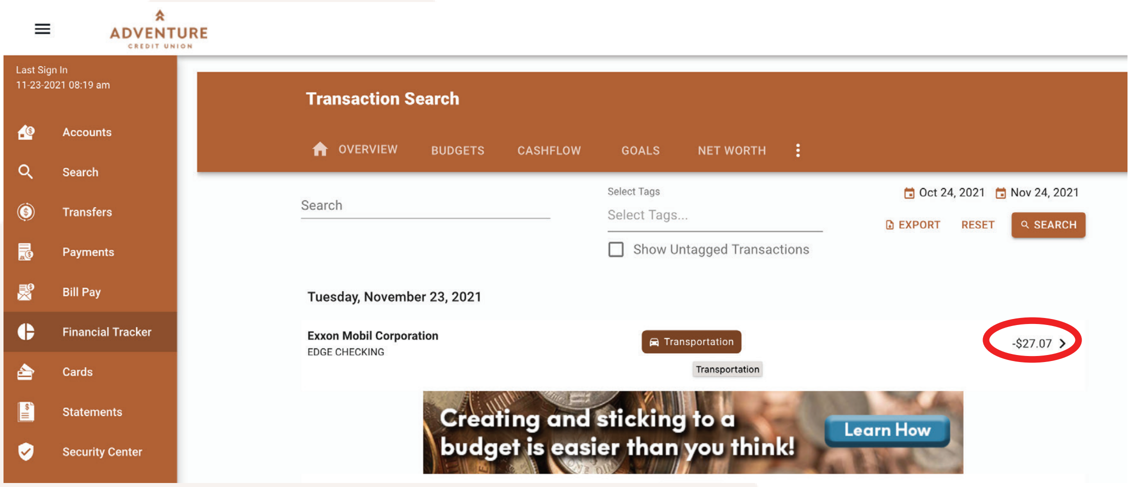
After clicking, a pop up window will open. Delete the existing tag and type in a new one. As you type you will be presented with standard tag options, or you can type in your own custom tag.



When you use a custom tag, My $ Snapshot will ask you to “Add Tag” after you hit save.

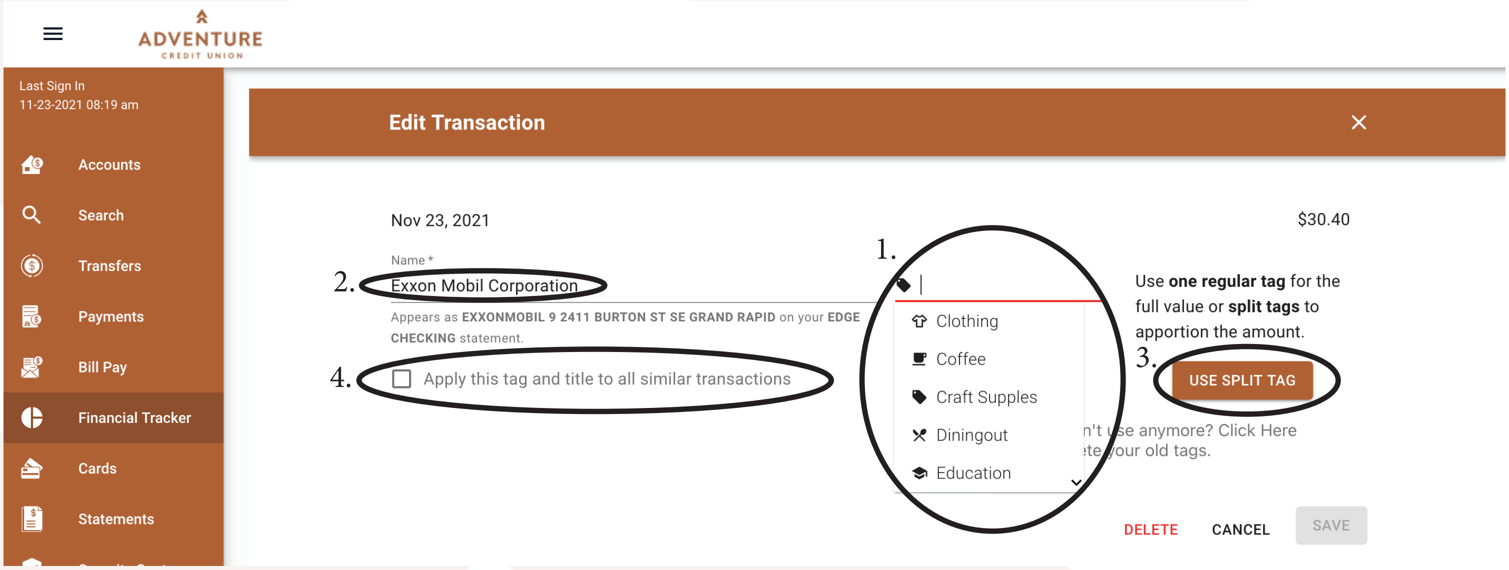


The second way to add or edit a tag is to click on the actual transactions as shown below.



The “Edit Transaction” screen will load. From here you can add or edit multiple details.

1. The tag
2. The transaction name
3. Use the “split tag” option if the transaction applies to two or more categories
4. Save the tag and title to apply to similar transactions in the future



When your changes are complete, click the save button.
Reminder, these changes will only effect future transactions if the “apply this tag and title to similar transactions” option is selected.