## 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.

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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.

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

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

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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

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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.