

How to Edit Your Transaction Details

Digital Banking allows you to edit your transactions by adding tags, notes, images, and attachments. It's a simple way of personalizing and organizing your account history to make it easier for you to search for specific transactions.

01 Navigate to Transaction Details

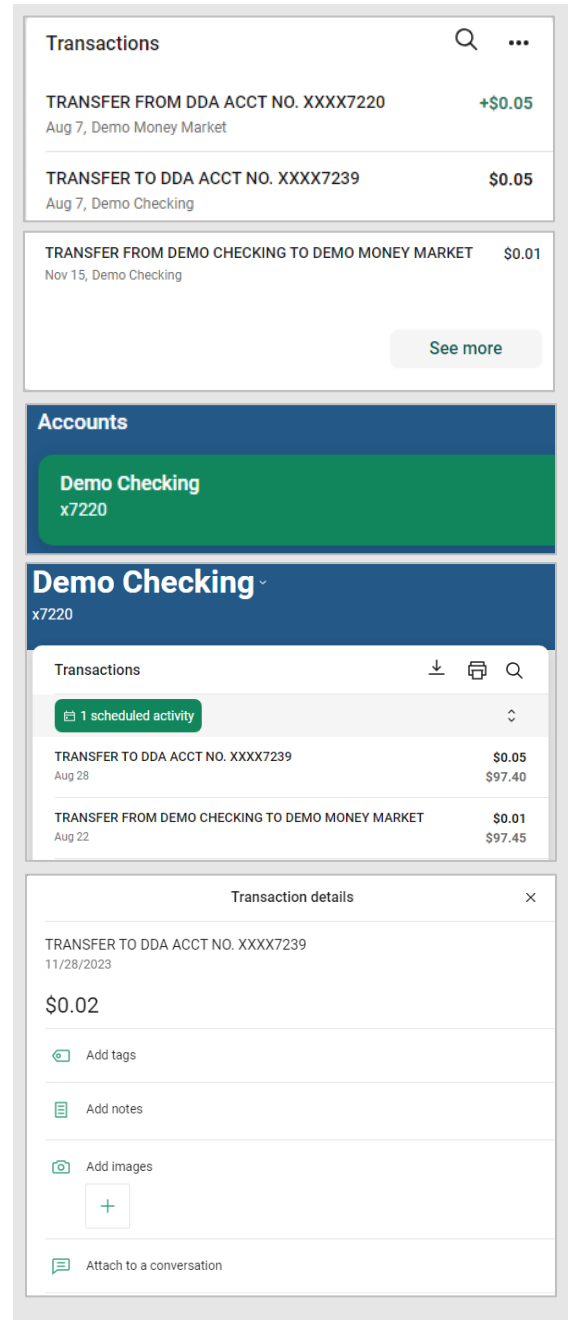
- From your main dashboard, you will have two options to access **Transaction Details**
 - On the left-hand side of the main dashboard, locate your Transactions list, and to see an extended version of the list, scroll down and click **See More**
 - Note: The list includes all your accounts held at MainStreet Bank
 - From your main dashboard, to view the transaction list for a specific account, click the account you would like to work with

02 Select Transaction

- Locate the transaction that you want to update
- Click anywhere within the transaction to open the Transaction Details dashboard

03 Manage Transaction Details

- In the Transaction Details dashboard, you have the following options
 - **Add Tags** – Categorize with a tag like groceries, utilities, or mortgage
 - **Add Notes** – Add context with a small note like *John's birthday present*
 - **Add Images** – Add an image like a receipt, invoice, or bill
 - **Attach to a Conversation** – Attach to an existing conversation or start a new conversation with a Connect Support Representative
- Edits and attachments will automatically save
- You can use any added details to easily filter and search for specific transactions



The image displays three screenshots of the MainStreetBank digital banking interface:

- Top Screenshot:** Shows a list of transactions for a specific account. The list includes:
 - TRANSFER FROM DDA ACCT NO. XXXX7220 (+\$0.05) on Aug 7, Demo Money Market
 - TRANSFER TO DDA ACCT NO. XXXX7239 (\$0.05) on Aug 7, Demo Checking
 - TRANSFER FROM DEMO CHECKING TO DEMO MONEY MARKET (\$0.01) on Nov 15, Demo Checking
 A "See more" button is visible at the bottom right.
- Middle Screenshot:** Shows the "Accounts" section with "Demo Checking x7220" selected. Below it, the "Demo Checking x7220" transaction list is shown, including:
 - TRANSFER TO DDA ACCT NO. XXXX7239 (\$0.05) on Aug 28 (\$97.40)
 - TRANSFER FROM DEMO CHECKING TO DEMO MONEY MARKET (\$0.01) on Aug 22 (\$97.45)
- Bottom Screenshot:** Shows the "Transaction details" dashboard for a transaction on 11/28/2023 for \$0.02. It includes options to:
 - Add tags
 - Add notes
 - Add images
 - Attach to a conversation