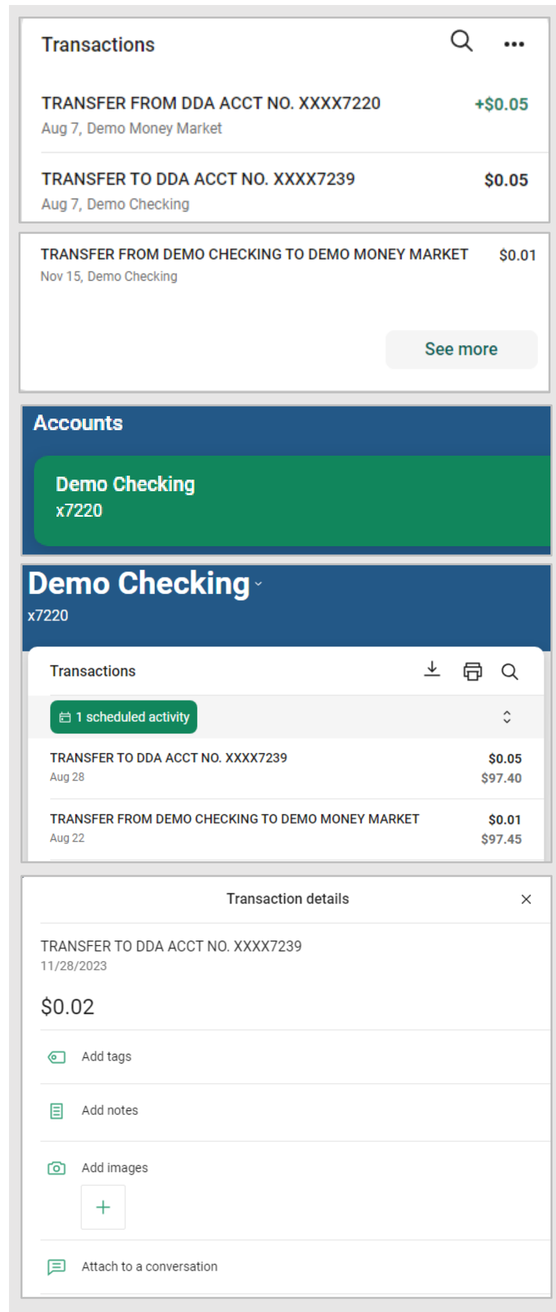
MainStreetBank DIGITAL BANKING

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