

How to Manage Tags in Insights

Digital Banking allows you to rename, delete, and split tags in Insights. Tags are labels or keywords that make it easier to filter and search for information and can provide context to your transactions.

01 Navigate to Transactions

- From your main dashboard, select an account to navigate to Insights.
- In the Account dashboard, click the Insights tile
- From the Insights dashboard top menu, navigate to the **ellipsis** (three dots), and
- From the dropdown menu, select Transaction Search
- A list of all your account transactions will be displayed

02 Edit the Tagged Transactions

- From the Transaction Search, select the **Tag** you want to update
- From the Tag pop-up, modify the Tag Name then click **Save**
- To modify the tag details, click More Options
- This will open the Edit Transaction screen for you to update the following sections:
 - **Name** Enter the transaction name
 - Tag Enter an alternative name
- Optional: Place a check mark to **Apply this tag and title to all** similar transactions
- Click Save

03 Split Transaction to Multiple Tags

- From the Transaction Search, select the **Tag** you want to split and on the Tag pop-up, click **More Options**
- From the Edit Transaction screen, on the right-hand side, click Use Split Tag
- This will open options to add more tags and allow you allocate the funds between different tags
- After adding all the desired tags, click Save

See our guide for How to Analyze Spending by

Category in Insights to see where you are spending the majority of your funds.

r H Tra	nsaction Search	
Aco	counts	
Wednesday, October 23, 2024		
Transfer Demo Money Market	Savings	
Savin	Savings	
MORE		
Name*	Savings	
Appears as TRANSFER FROM D Market statement.	DDA ACCT NO. 2010007220 on your Demo Money	
Apply this tag and tit	tle to all similar transactions	
Use one regular tag for the		
full value or split tags to		
apportion the amount.		
	_	
DELETE	CANCEL SAVE	
Savings	\$	
	_	
•	\$	
	_	
ADD TA	G To allocate: \$0.05	
	AUTOFILL REMAINING	

