MainStreetBank

DIGITAL BANKING

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

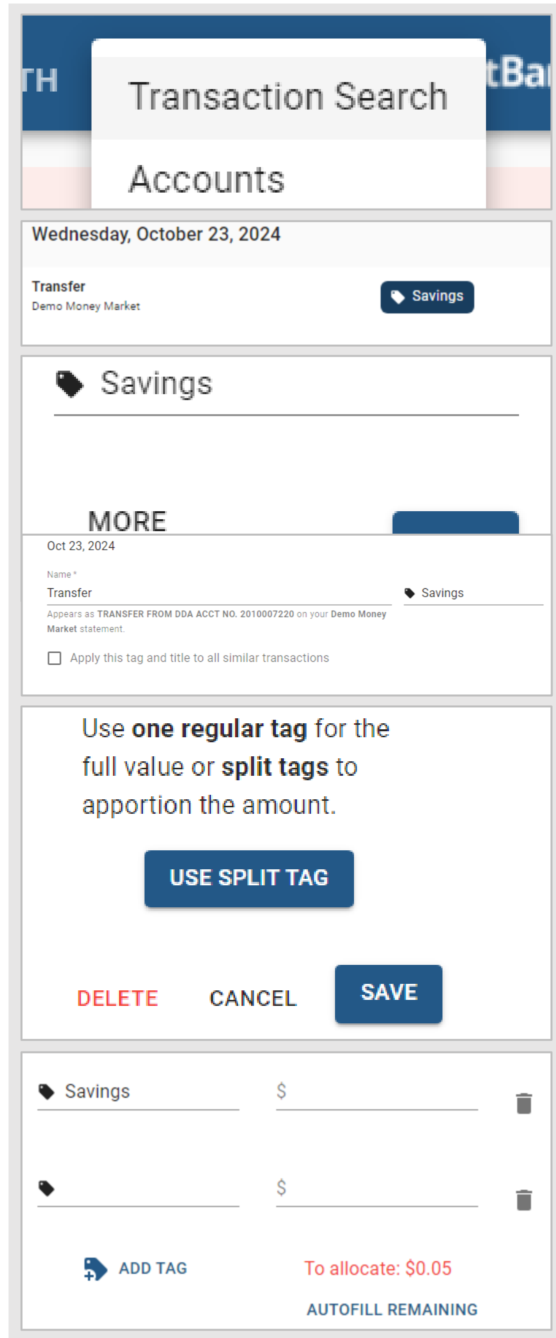
- From your main dashboard, select an account to navigate to Insights.
- In the Account dashboard, click the **Insights** tile
- From the Insights dashboard top menu, navigate to the **ellipsis** (three dots), and
- From the dropdown menu, select **Transaction Search**
- A list of all your account transactions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