Using the Transactions view
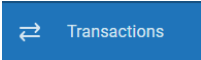
To access the **Transactions** view, either select an individual account or select [⇄ Transactions] to view transactions for all of your accounts.

> ℹ️ A list of transactions is also called your **Register**.

The **Transactions** view displays your individual transactions, both income and expenses. The default view is by date, but you can select other columns, such as **Payee**, **Category**, or **Amount** to sort by those values.

Updating your transactions

You can use the **Transactions** view to make updates to your transactions. Most people download their transactions from their financial institution, but if you manually maintain your transactions, you can use ➕ to add new transactions. A new line will appear on your transactions list, with the **Payee Name** field selected. Enter the name of your **Payee** and either press the **Tab** key to move to the next field or select any field you want to enter information in. Press **Enter** to finish adding the transaction.

Jennifer Checking	03/26/2021	Payee Name	Uncategorized	⅄ Ⓤ	0.00	💾 ✕ ⌄

You can update any existing transaction by selecting the field you want to edit. You should pay especially close attention to the **Category** field and update any transactions listed as **Uncategorized**. Always select a category for your transactions. It is the key to tracking your spending and setting a budget.

Automatically categorize uncategorized transactions

Going through your transactions one by one is the best way to determine the proper category for each transaction, but you also have the option to **Automatically categorize uncategorized transactions**. To do this, select ⚡. You'll be prompted to **Auto Categorize** a number of your transactions based on your transaction history.

> ℹ️ We found 27 uncategorized transactions we can categorize for you
>
> This action will categorize all of them based on prior history.
>
> CANCEL   AUTO CATEGORIZE

Searching your transactions

You can use the search box to search for transactions that match particular criteria such as a **Category**, a **Payee**, a **Date**, or a specific **Amount**.

Searching for amounts

When searching your transactions for amounts, there are many special searches that you can do. For the most part, you'll just want to enter in the amount, but if you need a more specialized search, below are some scenarios you may want to look at:

- Amount searches that start with '-' or '+' will restrict to expenses or income
- "23" will search for 23.00 or -23.00
- "-23.50" will search for -23.50
- "-23ish" will search for values roughly around -23.00
- "~-23" will also search for values roughly around -23.00
- "+>1000" will search for income transactions greater than 1000.00
- "+<1000" will search for income transactions less than 1000.00
- "-&50 .to. 100" will search for expense transactions between 50.00 and 100.00

Searching for dates

When searching your transactions for those made on specific dates, there are many special searches that you can do. Below are some scenarios you may want to look at:

- "02/03/2020" will search for transactions dated 02/03/2020
- "02/03/2020ish" will search for transactions dated around 02/03/2020
- ">02/03/2020" will search for transactions on or past 02/03/2020
- "<02/03/2020" will search for transactions on or before 02/03/2020
- "&02/03/2020 .to. 03/10/2020" will search for transactions between 02/03 and 03/10/2020

Downloading your transactions

If you want to download your transactions to a spreadsheet, you can do so using .

Your transactions will download to a .CSV file that you can open in your preferred spreadsheet application.

Using the Calendar view

While the default view for your transactions is a list, you also have the option of viewing your transactions as a calendar. You can switch between **List** view and **Calendar** view at the top of the page. The **Calendar** view is great for seeing your transactions over time, but it is only informational. If you want to add or update your transactions, return to **List** view.

	List View
	Calendar View