Custom Formatting Help for Transaction Names

SUMMARY
Use this feature to promote standard transaction naming conventions by displaying customized instructions below the transaction name field.

Short version: 1) Click your name in the upper right corner then "Admin / Settings." 2) Fill the transaction name instructions field with your own custom help text. 3) Click [Save] to finish.

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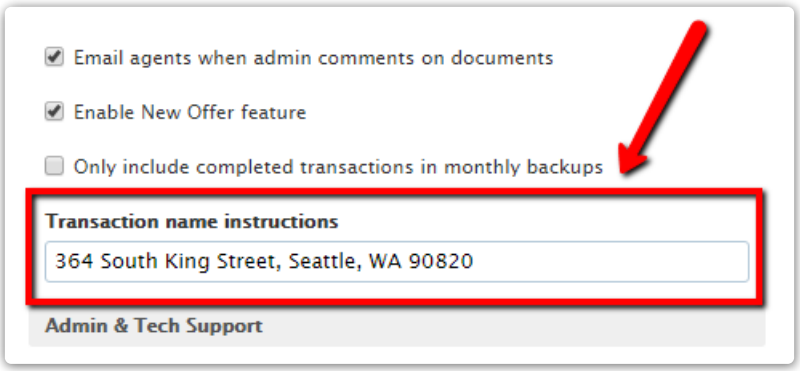
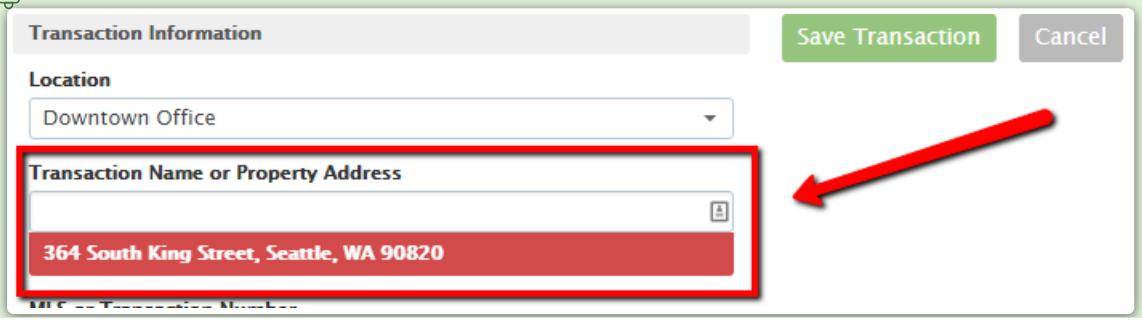
Edit the Help Message

The master admin on an account can edit the help message. Here's how:

1. **Go to Admin / Settings by clicking your name in the upper right corner, then [Admin / Settings].**
2. **Fill or edit the transaction name instructions field with your own custom help text.**
3. **Click [Save].**



The custom message will be shown in red under the transaction name field when creating or editing transactions.