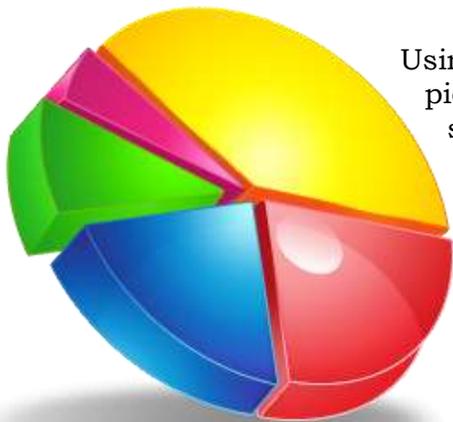


## **Budgeting Made Easy: Shop • Click • Track**

*Take advantage of the Bank Online personalized pie graph*



Using the **Categorize** button you'll be able to create a more dynamic pie graph. You can rename any items labeled "Uncategorized" to specific descriptions: Groceries, Daycare, Dental, Fuel, etc.

*Knowing exactly where your money goes can help with budgeting.*

### **Follow these steps to re-name the "Uncategorized" items:**

1. Click on the Categorize button.
2. Choose a date range, then click "View Transactions".
3. You will see your transactions with Descriptions and Categories. Hint: There may be multiple pages, scroll to the bottom to access additional pages.
4. Click the "Edit" icon to update each specific transaction separately. 
5. Change the name of the Description and Category. Many of our local establishments are labeled "Uncategorized" but can be changed to anything you want.
6. For example, if you want a Debit Card transaction to say "Groceries" click the category drop down menu and start typing "GR" and Groceries will automatically appear, or you may scroll through the list of options provided.
7. Once you are done making your edits, click on the "Save" icon. 
8. Now click on "Report" to see graphs of your Expense Report and Income Report.
9. You may even choose a different account from the dropdown menu.

***Now you'll have a better picture of where your money goes!***

Editing Icons:

Edit



Save



Undo



Categories: Auto & Transport, Business Services, Checks & Withdrawals, Education, Entertainment, Fees & Charges, Financial, Food & Dining, Gifts & Donations, Health & Fitness, Home, Income, Kids, Payments, Personal Care, Pets, Shopping, Taxes, Transfers, Travel, Utilities & Services.

***Please Note:*** The changes you make to Categories only apply to the Spending Report, and do not carry over to Statement views.