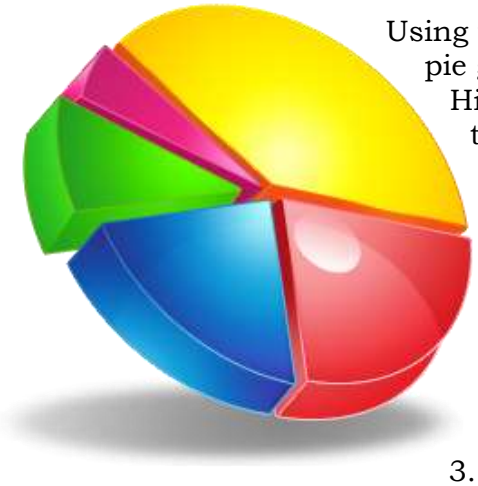
SNBT HOME

Budgeting Made Easy: Shop • Click • Track

Take advantage of the Bank Online personalized Spending Report pie graph



Using the **Extended History** tab you'll be able to create a more dynamic pie graph for your **Spending Report**. Once you open the Extended History window, you can re-name 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 in your Spending Report:

1. Click on the new "Extended History tab located under the SNBT logo.
2. A new window will take a moment to load with transactions for that account.
3. Choose a date range (the farthest back you will be able to go is February 1, 2014 when this new feature was implemented), then click "View Transactions".
4. Below you will see your transactions with Descriptions and Categories, there may be multiple pages located at the bottom of the screen.
5. Click the "Edit" icon to update each specific transaction separately.
6. Here you can change the name of the Description and the Category. Many of our local establishments are labeled "Uncategorized" but can be changed to anything you want.
7. 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.
8. Once you are done making your edits, click on the "Save" icon.
9. When you are completely done updating, click the X in the upper corner of the overlay window.
10. Now click on "Accounts" from the blue menu bar under the SNBT logo.
11. You'll be brought back to the main page with the Spending Report graph. Choose an account and a date range and click "Chart My Spending".
    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 Descriptions and Categories only apply to the Spending Report, and do not carry over to Current Statement or Previous Statement views.