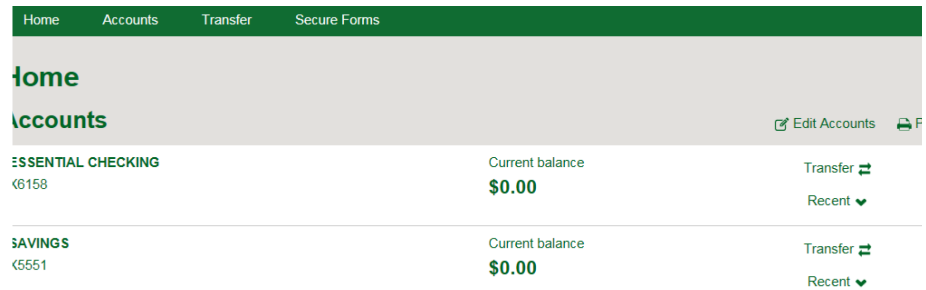
How to Categorize in Online Banking

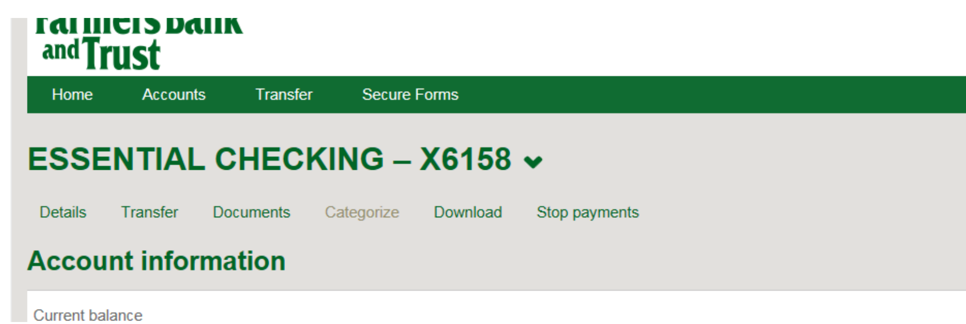
1 SELECT ACCOUNT

Click on any account number on the Home Page or Accounts Screen.



2 CHOOSE CATEGORIZE

Select Categorize from the options below the account name.



3 INPUT CRITERIA

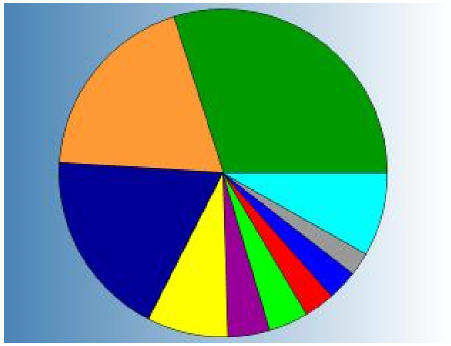
Choose the current or previous statement cycle or leave at Custom and choose date range below. Select how many items to view per page and push View Transactions.

4 CATEGORIZE TRANSACTIONS

Click the edit icon next to a transaction to choose a category from the drop down and hit the Save icon.

5 VIEW REPORT

After you have saved all of your categorizations, click the Report Button above to view your expense and income reports.



	Category	Amount	Percent
	Transfers	$2,076.26	29.9%
	Payments	$1,331.06	19.1%
	Checks and Withdrawals	$1,285.09	18.5%
	Auto and Transport	$554.48	8.0%
	Food and Dining	$286.18	4.1%
	Education	$271.42	3.9%
	Kids	$210.97	3.0%
	Utilities and Services	$210.27	3.0%
	Entertainment	$157.50	2.3%