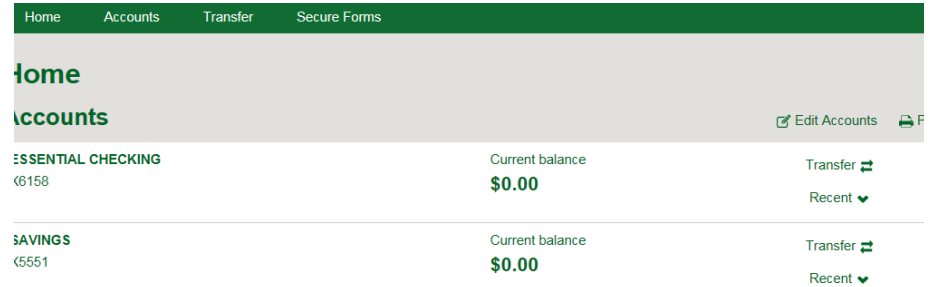


# How to Categorize in Online Banking

1

## SELECT ACCOUNT

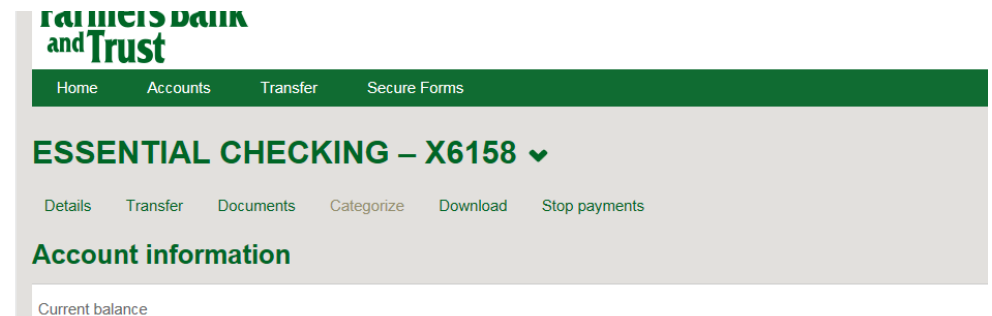
*Click on any account number on the Home Page or Accounts Screen.*



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.*

The screenshot shows a search interface titled "Transaction Activity". It includes the following fields and options:

- Account: XXX8568
- Date: Custom
- Date Range: 06/03/2015 To 07/03/2015
- Search For: All Activity
- Transactions Per Page: 25 Per Page
- Buttons: View Transactions, Report
- Links: [Go to Advanced Search](#), [Export 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 .*

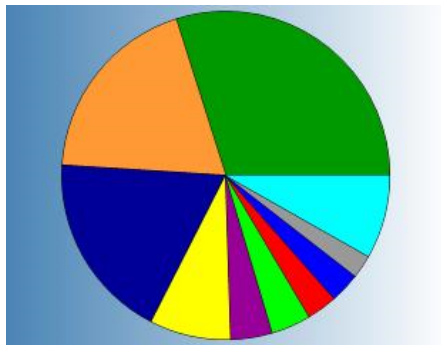
The screenshot shows a transaction entry form with a dropdown menu for categorizing a transaction. The form includes the following elements:

- Description: AMERICAN FUNDS INVESTMENT 0000000
- CHASE CARD SERV ONLINE PMT CKF382789971POS
- Category dropdown menu with options: Income: Interest, Income: Investment, Income: Other, Income: Salary, Income: Tax Refund(Federal/State/Local), Income: Unemployment Compensation, Expense: Education
- Expense: Credit Card Payments

## 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%