How to Categorize in Online Banking

1. Select Account.

Click on any account number on the home page or accounts screen.

1. Choose Categorize.

Select categorize from the options below the account name.

1. Input Criteria.

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

1. Categorize Transactions.

Click the edit icon next to any transaction to choose a category from the drop down box. Once you have selected the category, hit the Save icon.

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