DIGITAL BANKING

QUICK GUIDE

SEARCH AND CATEGORIZE TRANSACTIONS

HOW TO SEARCH TRANSACTIONS IN ONLINE BANKING

1. Hover over **Accounts**
2. Click **Accounts**
3. Click **Transactions**
4. Select the details for the search
5. Click **Search**

HOW TO CATEGORIZE TRANSACTIONS IN ONLINE BANKING

1. Hover over **Financial Planning**
2. Click **Savings Goals**
3. Under View Transactions, **click the blue description** under the transaction you wish to change

5. **Select the category** you wish to apply to that transaction

Note: You can also select whether you would like all future transactions from that vendor to be listed as the same

UPDATING A TRANSACTION DESCRIPTION

Note: This feature is not available on the mobile app

1. Hover over **Accounts**
2. Select **Accounts**
3. **Select the account** where the transaction's description needs to be updated
4. **Click on the transaction**
5. Click on **Help**
6. Select **The transaction's simple description is incorrect** and click **Select**
7. Select **Original Description**
    - **Note:** Changing the description to Original Description will help improve the Simple Description in the future
8. Click **Update**

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