

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