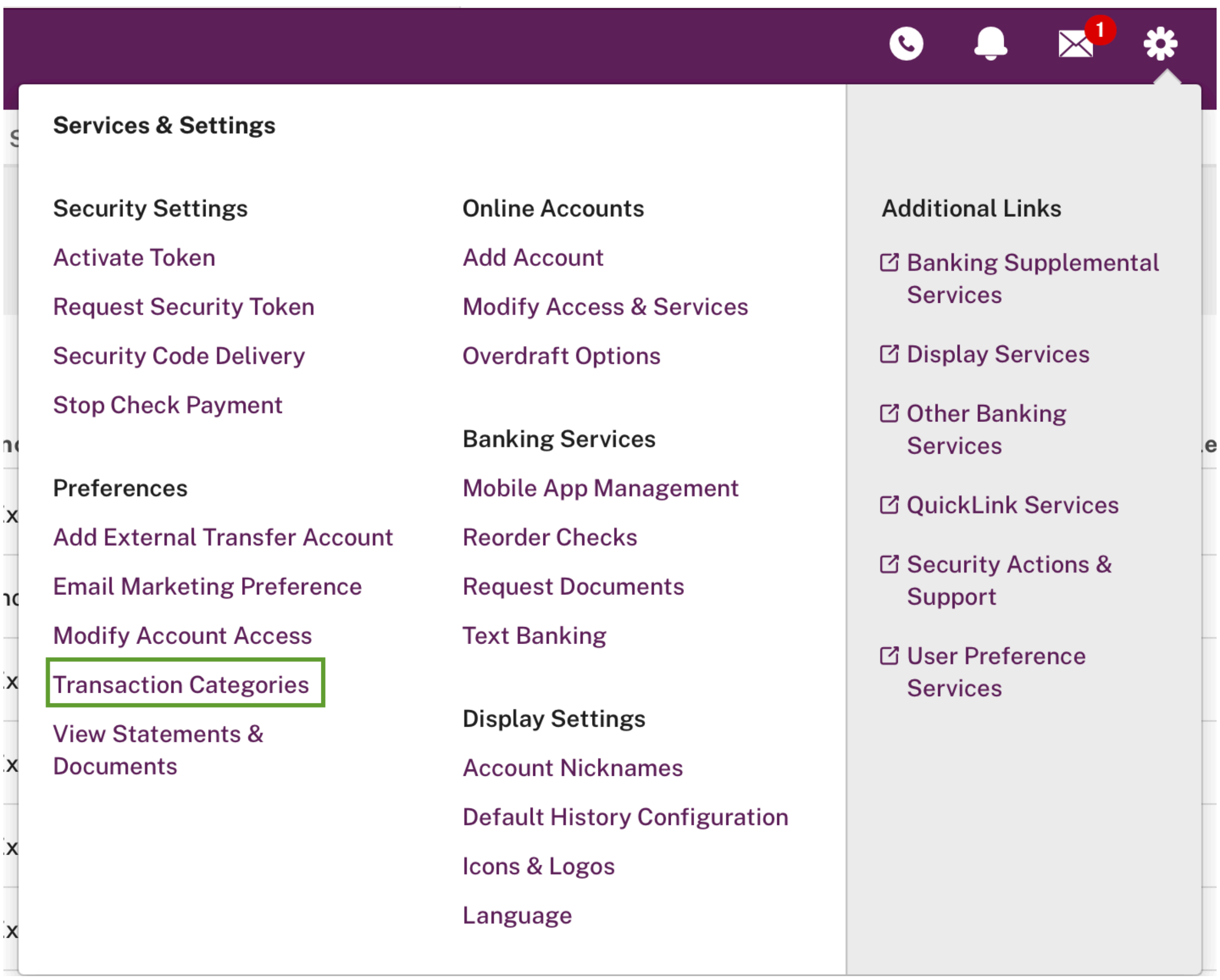
How to Add, Modify, & Delete Transaction Categories with My Spending?

How Do I Add a Transaction Category with My Spending?

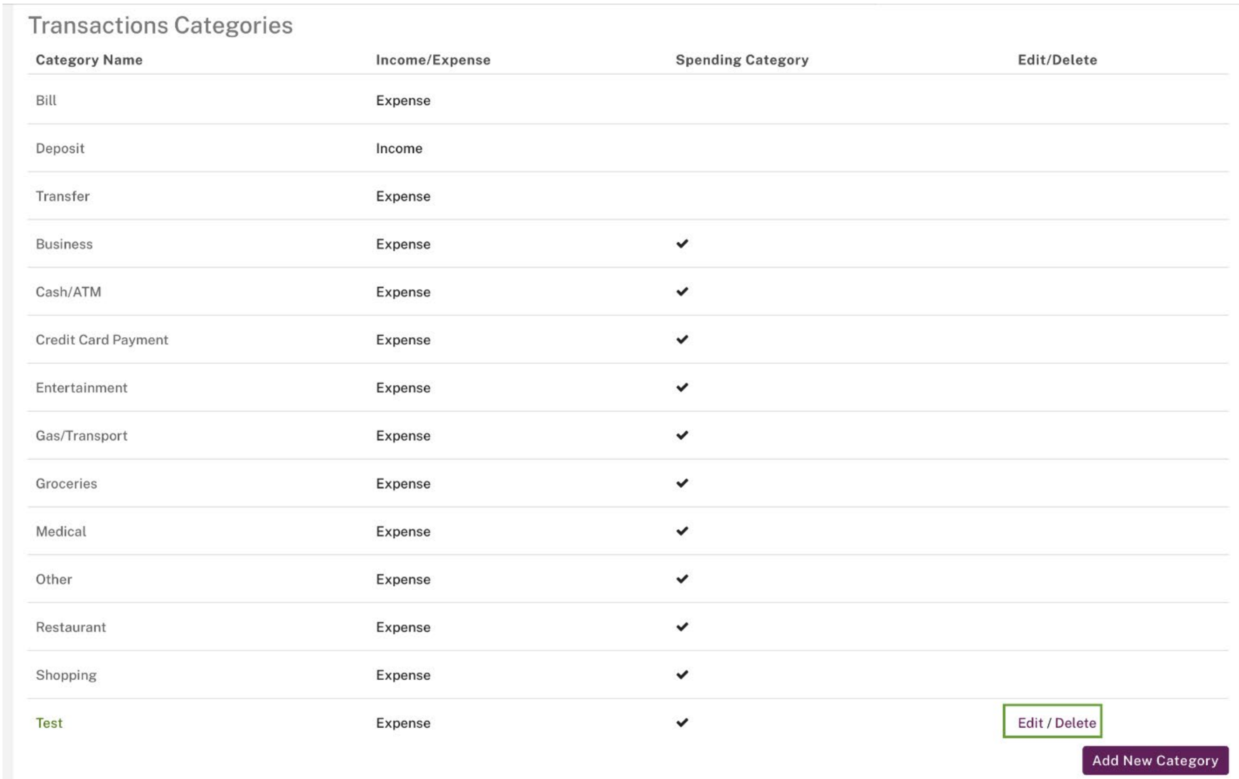
If you require additional transaction categories other than the defaults, you can add up to fifteen (15) custom transaction categories to suit your needs.

To add a new transaction category, do the following.

1. On the Services & Settings page, click **Transaction Categories** in the Preferences section.



2. On the Transaction Categories page, click **Edit/Delete Categories**.

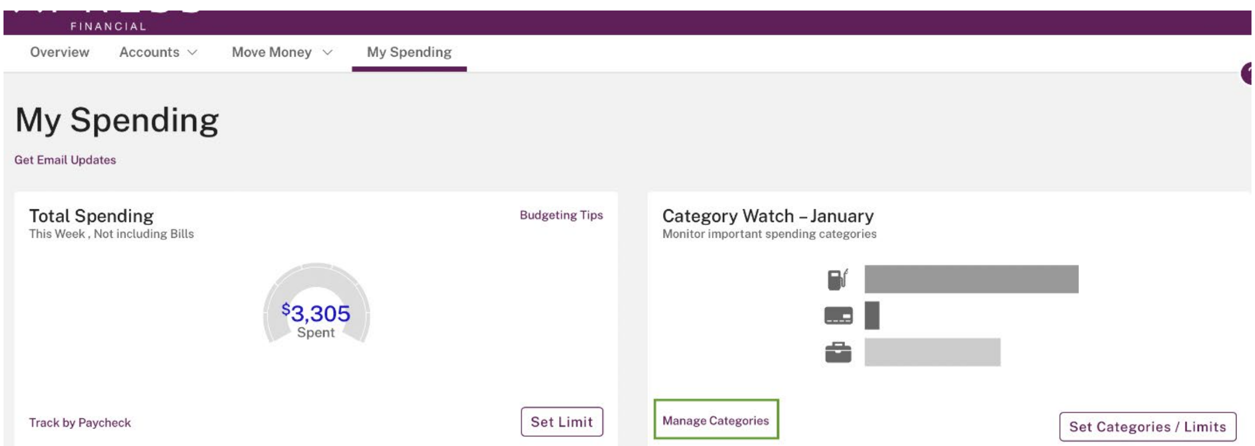


Transactions Categories

Category Name	Income/Expense	Spending Category	Edit/Delete
Bill	Expense		
Deposit	Income		
Transfer	Expense		
Business	Expense	✔	
Cash/ATM	Expense	✔	
Credit Card Payment	Expense	✔	
Entertainment	Expense	✔	
Gas/Transport	Expense	✔	
Groceries	Expense	✔	
Medical	Expense	✔	
Other	Expense	✔	
Restaurant	Expense	✔	
Shopping	Expense	✔	
Test	Expense	✔	Edit / Delete

Add New Category

3. Or, Click **Manage Categories** under the **My Spending** tab.



NOTE: If fifteen custom categories have already been added, the **Add New Category** button does not appear.

The Add New Category dialog box appears.

Transactions Categories

Category Name	Income/Expense	Spending Category	Edit/Delete
Bill	Expense		
Deposit	Income		
Transfer	Expense		
Business	Expense	✔	
Cash/ATM	Expense	✔	
Credit Card Payment	Expense	✔	
Entertainment	Expense	✔	
Gas/Transport	Expense	✔	
Groceries	Expense	✔	
Medical	Expense	✔	
Other	Expense	✔	
Restaurant	Expense	✔	
Shopping	Expense	✔	

Add New Category

4. In the **Category Name** box, enter a new category name, up to 64 characters.
5. In the **Choose a category type** list, select either Income or Expense.
6. If you want to designate the category as a Spending category, so it can be tracked in My Spending, select the check box.
7. Click **Save**.

How Do I Modify My Transaction Categories—with My Spending?

Users who have My Spending and want to update their transaction categories should do the following.

1. On the Services & Settings page, click **Transaction categories** in the Preferences section.
2. On the **Transactions Categories** page, look over your categories.

NOTE: Only custom categories, which you have created, can be updated. They appear at the bottom of the list, in a different color.

3. Scroll down and click the custom category's **Edit** link in the Edit/Delete column.

Transactions Categories

Category Name	Income/Expense	Spending Category	Edit/Delete
Bill	Expense		
Deposit	Income		
Transfer	Expense		
Business	Expense	✔	
Cash/ATM	Expense	✔	
Credit Card Payment	Expense	✔	
Entertainment	Expense	✔	
Gas/Transport	Expense	✔	
Groceries	Expense	✔	
Medical	Expense	✔	
Other	Expense	✔	
Restaurant	Expense	✔	
Shopping	Expense	✔	
Test	Expense	✔	Edit / Delete

Add New Category

The Edit Category dialog box appears.

This dialog box is also accessible from the Accounts page, by clicking **Edit/Delete Category** in the Category column drop- down list for a custom category.

4. In the **Category Name** box, change the name.
5. Select Income or Expense in the **Choose a category type** list.
6. If you want to designate the category as a Spending category, so it can be tracked in My Spending, select the check box.
7. Click **Save**. The Transactions Categories page shows the update.

How Do I Delete a Transaction Category—with My Spending?

You can delete a custom transaction category when it is no longer needed. Default categories cannot be deleted. Once you delete a category, transactions will no longer have the category assigned to them, so you must select a different category to be assigned to any such item.

To delete a custom transaction category, do the following.

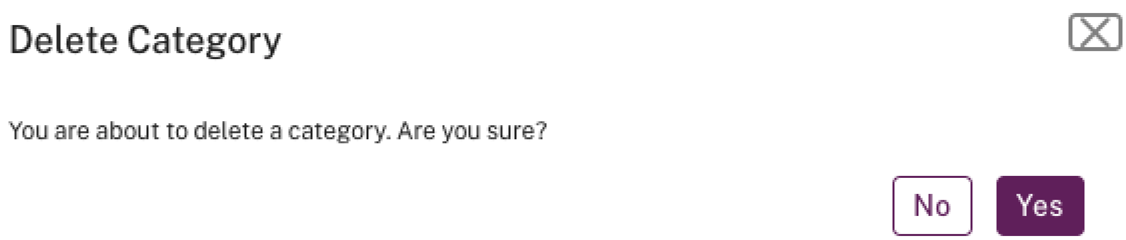
1. On the Services & Settings page, click **Transaction categories** in the Preferences section.
2. Scroll down and click the custom category's **Delete** link in the Edit/Delete column.

Only custom categories, which you have created, can be deleted. They appear at the bottom of the list, in a different color.

You can also delete a category starting from the Accounts page, by clicking **Edit/Delete Category** in the Category column drop-down list for a custom category. Use the **Delete** button available in the Edit Category dialog box that appears.

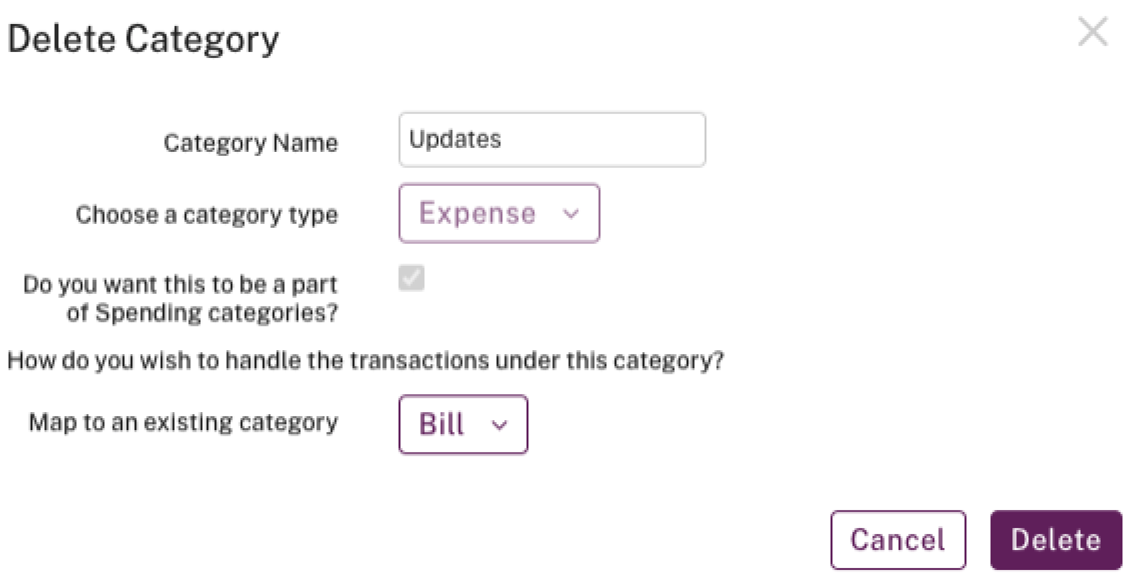
The Delete Category confirmation dialog box appears.

3. Click **Yes**.



The Delete Category dialog box changes to show the category's current settings and a drop-down for remapping the category.

4. Using the **Map to an existing category** list, select the category to which any transactions currently categorized with the category to be deleted should be assigned.
5. Click **Delete**.



The custom category you deleted no longer appears on the Transactions Categories page, or as an option in Category lists.