## How to Add, Modify, \& Delete a Transaction Category Without My Spending

## How Do I Add a Transaction Category Without My Spending?

If you require additional transaction categories other than those listed, you can add any number of transaction categories to suit your needs.

To add a new transaction category, do the following.

1. On the Services \& Settings module, click Transaction categories in the Preferences section.

|  |  |  | (b) $\lambda^{1}$ |
| :---: | :---: | :---: | :---: |
| s | Services \& Settings |  |  |
|  | Security Settings | Online Accounts | Additional Links |
|  | Activate Token | Add Account | $\square$ Banking Supplemental |
|  | Request Security Token | Modify Access \& Services | Services |
|  | Security Code Delivery | Overdraft Options | ¢ Display Services |
| 11 | Stop Check Payment | Banking Services | $\longleftarrow$ Other Banking Services |
|  | Preferences | Mobile App Management | ¢ QuickLink Services |
|  | Add External Transfer Account | Reorder Checks |  |
| c | Email Marketing Preference | Request Documents | ㄱScurity Actions \& Support |
|  | Modify Account Access | Text Banking | $\square 3$ User Preference |
| $x$ | Transaction Categories |  | Services |
|  | View Statements \& | Display Settings |  |
| x | Documents | Account Nicknames |  |
|  |  | Default History Configuration |  |
| x |  | Icons \& Logos |  |
| x |  | Language |  |

2. On the Transaction Categories page, click Add New Category.

The Add New Transaction Category page appears.
NOTE: You can also reach this page by clicking Add new category in a transaction's Category list on the Accounts page.
3. In the Category Type list, select a category type, either 'Income' or 'Expense.'
4. In the Category Name box, enter a new category name, up to 64 characters.
5. In the Category Description box, enter a brief description.
6. Click Save \& Return to add your category, or Save \& Add Another Category to add more categories.

## Add New Category



## Cancel <br> Save

A confirmation message appears at the top of the page.

## How Do I Modify My Transaction Categories—no My Spending?

The system provides a default set of categories to get you started with your transactions. You can modify any existing category to suit your needs.

To update your transaction categories, do the following.

1. On the Services \& Settings page, click Transaction categories in the Preferences section.
2. On the Transaction Categories page, look over your categories. If you want to update a category, click its Category Name link.

The Edit Transaction Category page appears.
3. On the Edit Transaction Category page, select Income or Expense in the Category Type list.
4. In the Category Name box, change the name.
5. In the Category Description box, change the description of the category.
6. Click Save Changes.

