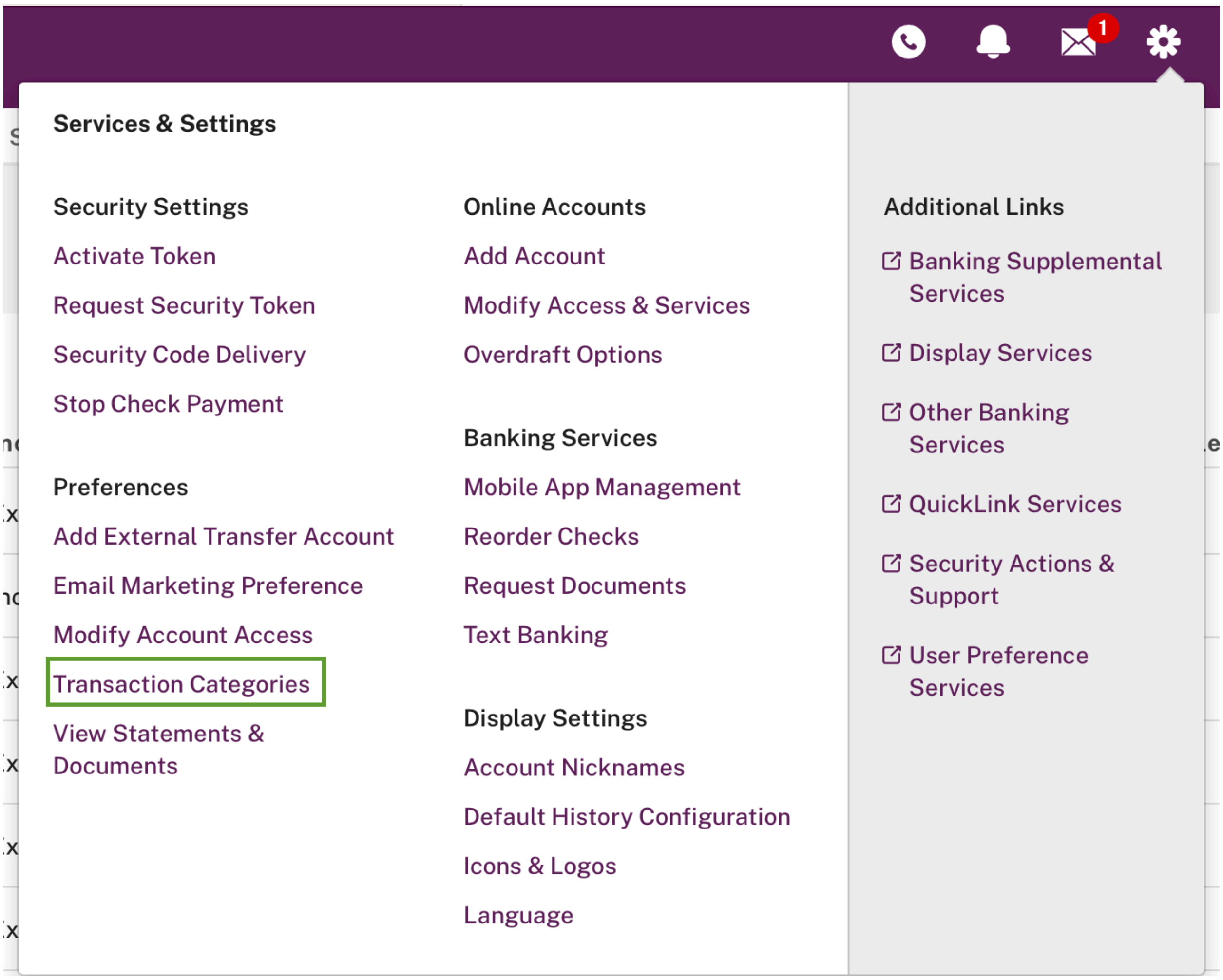
How to Add, Modify, & Delete a Transaction Category Without My Spending

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.

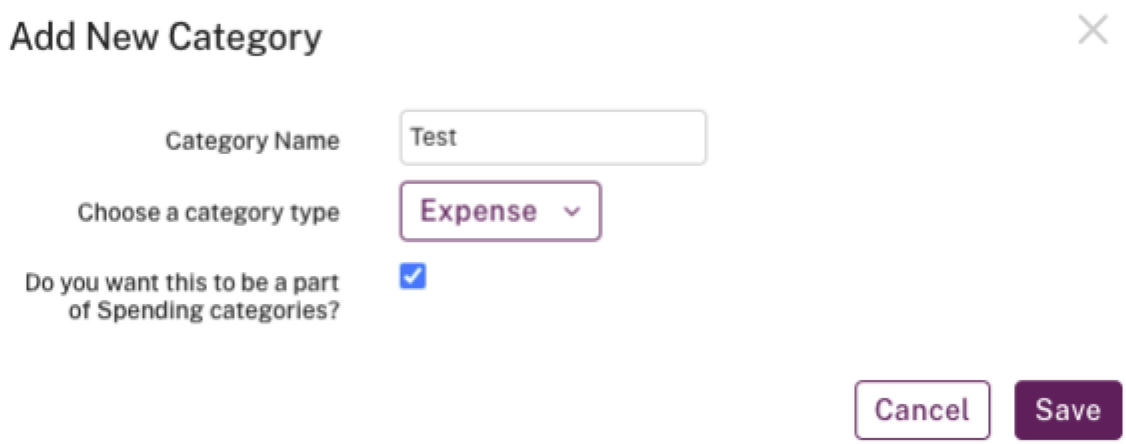


2. On the Transaction Categories page, click **Add New Category.**

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.



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**.