

**To view and categorize all transactions do the following:**

- Log on to Online Banking
  - Choose the checking or savings account you would like to view.
  - Click on Categorize

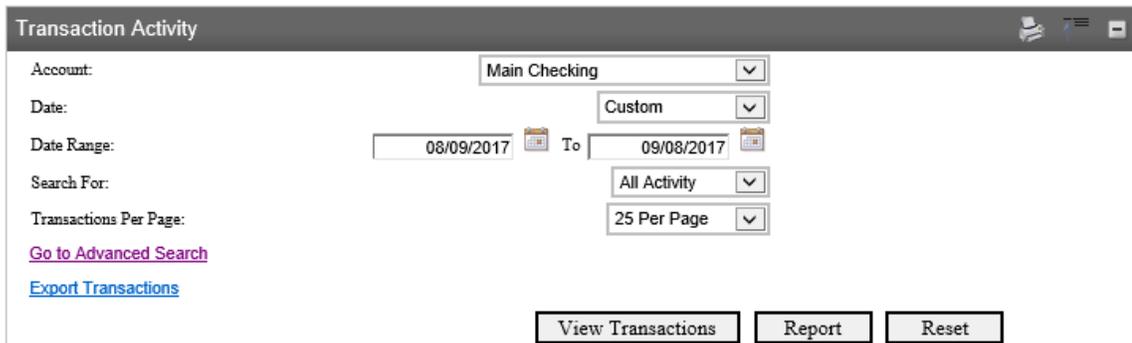


**Main Checking – XXX1234** ▼



- The Categorize Transactions screen will appear with your recent transactions. You are able to search by the following options:
  - Account
  - Date
  - Date Range
  - All Activity
  - Check Number
  - Amount
  - Then choose the number of transactions per page
- Clicking on Advanced Search will give some search options:
  - Amount Range
  - Check Number
  - Sort By
  - Then By

**Categorize Transactions**



- Your transactions will be displayed under the “Transactions” banner where you will be able to categorize each transaction based upon your options in the drop down list.
  - To change a Category, click on the pencil and paper icon to the right of the category column. A drop down menu will appear with a list of categories.
  - Click the drop down arrow and scroll until you see the category you would like to put this transaction into. Once you have chosen the category, click the “Save” icon. If you would like to view the check, click on the hyperlink and the image will appear even if it was a check that was written at the beginning of the year.

Transaction Activity

Account: Main Checking

Date: Custom

Date Range: 08/09/2017 To 09/08/2017

Amount Range: To

Check Number: To

Sort By: (None)

Then By: (None)

Transactions Per Page: 25 Per Page

[Go to Basic Search](#)  
[Export Transactions](#)

Pending Activity

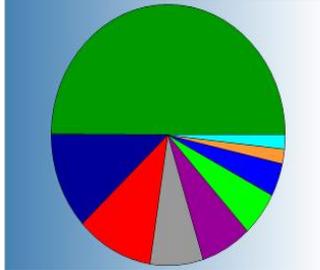
Date	Description	Debit	Credit	Balance
09/08/2017	Acorns Investing Transfer	\$6.16		\$143.44

Transactions

Export	Date	Transaction Number	Description	Category	Debit	Credit
<input type="checkbox"/>	09-05-2017	XXXX	POS PURCHASE SHELL OIL 57446	Fuel		\$4.33
<input type="checkbox"/>	09-05-2017		POS PURCHASE SPEEDWAY 015075 DELPHOS OH LK654254 022408	Auto and Transport : Fuel		\$5.09
<input type="checkbox"/>	09-05-2017		POS PURCHASE TACO BELL # 0323 BLUFFTON OH 00462335 040017	Food and Dining : Fast Food		\$8.15
<input type="checkbox"/>	09-05-2017		POS PURCHASE JOEY'S ITALIAN DE LIMA OH 76208516 032142	Uncategorized		\$10.13

- Currently not all of your transactions will show up under a Category; they may appear as “Uncategorized”. If you would like to view your Expenses and your Income by specific categories you will categorize them first. Once completed, click on “Report”. This will allow you to see a pie chart that will break down your expenses and your income. To return to Transactions, click on View Transactions, otherwise you can navigate to another area of Online Banking by choosing the appropriate menu item from the top left menu.

Spending Report



Category	Amount	Percent
Household Miscellaneous	\$745.00	49.8%
Groceries	\$179.86	12.0%
Insurance	\$158.44	10.6%
Entertainment	\$109.35	7.3%
Education	\$104.09	7.0%
Gas	\$82.01	5.5%
Dining Out	\$61.01	4.1%
Homeowner Fees	\$27.64	1.8%
Gift	\$25.00	1.7%
Other	\$4.00	0.3%
Personal Care	\$4.00	0.3%

Income Report

No Results Found

**To find an image of a check, do the following:**

- While viewing All Transactions, click on the hyperlink of the check number and it will pull up that information. For example, if you are looking for an image of a check from January 15, 2012, you can search for the date or check number and pull that image up from the screen.

**Transaction Activity**

Account:

Date:

Date Range:  To

Search For:

Transactions Per Page:

[Go to Advanced Search](#)

[Export Transactions](#)

