



Tagging Transactions

Want to categorize your purchases for easier tracking? You can now tag your recent transactions.

1. Log in to Online Banking. The **Recent Transactions** tile will be located on your main dashboard.

Recent Transactions	
Thursday, Apr 18	
Transfer to Venmo	-\$94.00
Transfers	Simple Checking
Wednesday, Apr 17	
Tfr to XXXXX Transfer ...	-\$1,092.19
Transfers	Simple Checking
Execupay Deposit	\$343.13
Deposits	Simple Checking
Tuesday, Apr 16	
Payment to Midwest E...	-\$476.89
Utilities	Simple Checking

2. Select one of your recent transactions and navigate to the **Tags** section. Type in a word used to categorize your transaction. Hit **Enter**.

ENERGYBILL CONSUMERS ENERGY ID2380442310 Internet Initiated Transaction- -\$122.50
Simple Checking

Effective Date
December 17, 2024

Tags
Use tags to categorize and organize your transactions.

electricity

Press Enter to add new values. You may not exceed 20 values.

3. Select either **Save Changes** to save the tag or **Cancel** to delete the tag.

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Tags
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electricity ✕

Add tag...

Press Enter to add new values. You may not exceed 20 values.

Save Changes
Cancel

4. Now when you type in a tagged phrase, all the transactions that have that tag will appear.

\$ **Recent Transactions**

✕

Sort & Filter

Tuesday, Dec 17

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You've reached the end of your transaction history. To see more, go to Statements.