



Personal Online Banking - Activity Manager Information

Activity Manager is a new feature to Online Banking!

This service will allow you to:

- **Categorize your transactions to create a spending chart or report.**

Once logged into Online Banking, click on one of your checking or savings accounts. You will now see a Categorize button.



On this screen, you will see that the system has “auto-categorized” some transactions based on the description. If it doesn’t know, it will leave it listed as Uncategorized.

Transaction Activity

Account: Personal Checking
Date: Custom
Date Range: 06/03/2019 To 07/03/2019
Search For: All Activity
Transactions Per Page: 25 Per Page

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

[View Transactions](#) [Report](#) [Reset](#)

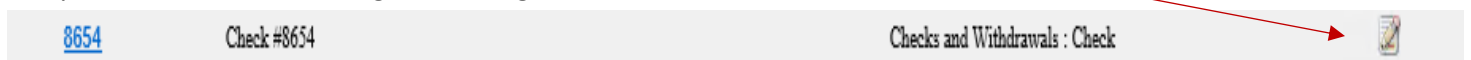
Pending Activity

Date	Description	Debit	Credit	Balance
07/02/2019	875194 DDA PURCHASE FESTIVAL FOODS FORT ATKINSON WI 25147305 875194	\$18.45		\$623.94
07/03/2019	CKFXXXXX4412POS CHARTER COMM ONLINE PMT	\$200.29		\$423.65

Transactions

Export	Date	Transaction Number	Description	Category	Amount	Balance
<input type="checkbox"/>	07/02/2019		PremierIDSecurity Monthly Fee	Fees and Charges : Bank Fee	-\$7.00	\$642.39
<input type="checkbox"/>	07/02/2019	XXXXX01-01	NORTHWESTERN MU ISA PAYMENT	Financial : Insurance	-\$70.85	\$649.39
<input type="checkbox"/>	07/02/2019	88505	DDA PURCHASE BENEFITS PLUS 561-832-5010 FL 00000000 088505	Gifts and Donations	-\$45.00	\$720.24
<input type="checkbox"/>	07/01/2019	676382	DDA PURCHASE FESTIVAL FOODS FORT ATKINSON WI 25147302 676382	Food and Dining : Groceries	-\$121.78	\$765.24
<input type="checkbox"/>	07/01/2019	453595	DDA PURCHASE FESTIVAL FOODS FORT ATKINSON WI 25147306 453595	Food and Dining : Groceries	-\$79.96	\$887.02
<input type="checkbox"/>	07/01/2019	711736	DDA PURCHASE FESTIVAL FOODS FORT ATKINSON WI 25147308 711736	Food and Dining : Groceries	-\$25.29	\$966.98
<input type="checkbox"/>	07/01/2019	511192	DDA PURCHASE WALGREENS STORE 300 FORT ATKINSON WI 99999999 5111	Health and Fitness : Pharmacy	-\$19.46	\$992.27
<input type="checkbox"/>	07/01/2019	210462	DDA PURCHASE 1520 SOUTH MAIN STR JEFFERSON WI 24349901 210462	Uncategorized	-\$13.48	\$1,011.73

You can change the categorization of any transaction by clicking on the pencil and paper icon. A drop box will appear and you can choose from a long list of categories.



You can create a spending report by clicking on **Report** and export the transactions.

Category	Amount	Percent
Food and Dining	\$546.93	40.1%
Utilities and Services	\$289.29	21.2%
Health and Fitness	\$220.81	16.2%
Financial	\$70.85	5.2%
Auto and Transport	\$60.00	4.4%
Shopping	\$54.03	4.0%
Gifts and Donations	\$45.00	3.3%
Personal Care	\$36.00	2.6%
Home	\$32.66	2.4%
Fees and Charges	\$7.00	0.5%

If you **export** them as a csv file, they can be uploaded into most accounting software.

- **Search, view and export transactions from an extended transaction history.**

From this Categorization area or when your account transaction list, you will begin see an extended transaction history. The system will provide up to 18 months of extended transaction history. This will allow you to search, review, categorize and export transactions for longer periods of time.

The 18 months are not retroactive however, so depending on your statement cycle, you will begin to see history "grow" from your last statement date.

If you have any questions on this new service, please feel free to contact us at 920-563-6616.