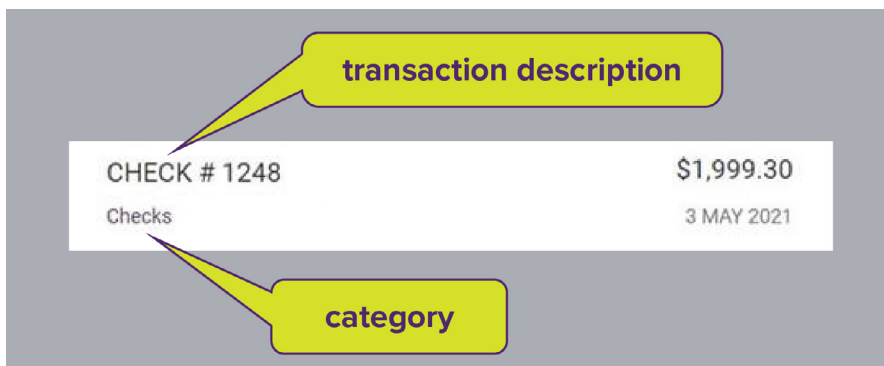


Editing Transaction Descriptions and Categories Guide (Online Banking)



Open up the **Accounts** or **Financial Wellness** widget to view your transactions.

Each transaction has a transaction description and a category defining the type of transaction which has occurred.



Accounts Widget Instructions

How to Change a Simplified Transaction Description Back to the Original Transaction Description -

Your transaction descriptions were simplified using AI in the **Financial Wellness** and **Accounts** widgets to make transactions easier to read, recognize and categorize during FCU Anywhere's June 10, 2021 update. To revert back to the original description prior to the update, follow the steps below:

1. Click on a transaction.
2. Click the blue ? Help link next to the transaction description.
3. Click the original description. Choose *The transaction's simple description is incorrect*, then **Select**.
4. Click the **Original Description**.
5. Select the **Update** button.

Changing a Category

1. To change a category, click on the category (beneath the transaction description) assigned to the transaction.
2. You will see categorization options.
3. Select another category.
4. Select **Save**.

How to Edit/Shorten Categories

1. Click the category assigned to the transaction.
2. Click the pencil tool underneath the category.
3. Remove part of the category description. You must leave up to 4 characters of the original description, as this is used by FCU Anywhere to categorize the transaction.

Financial Wellness Widget Instructions

How to Change a Simplified Transaction Description Back to the Original Transaction Description -

*Your transaction descriptions were simplified using AI in the **Financial Wellness** and **Accounts** widgets to make transactions easier to read, recognize and categorize during FCU Anywhere's May 26, 2021 update. To revert back to the original description prior to the update, follow the steps below:*

1. Click on a transaction.
2. Click the blue ? next to the transaction description.
3. Click the original description.
4. Select the **Update** button.

Changing a Category

1. To change a category, click on the category (beneath the transaction description) assigned to the transaction.
2. You will see categorization options.
3. Select another category.
4. Select **Save**.

How to Edit/Shorten Categories

1. Click the category assigned to the transaction.
2. Click the pencil tool underneath the category.
3. Remove part of the category description. You must leave up to 4 characters of the original description, as this is used by FCU Anywhere to categorize the transaction.

How to Make Bulk Edits to Categories

1. Select **Bulk Edit** from the transactions list.
2. Choose **Select All** or check the transactions you would like to change.
3. Select the **Assign Category** button.
4. Select a new category.
5. Choose **Save**.

[To learn more about the Financial Wellness widget, visit Florida Credit Union's Online Banking page.](#)