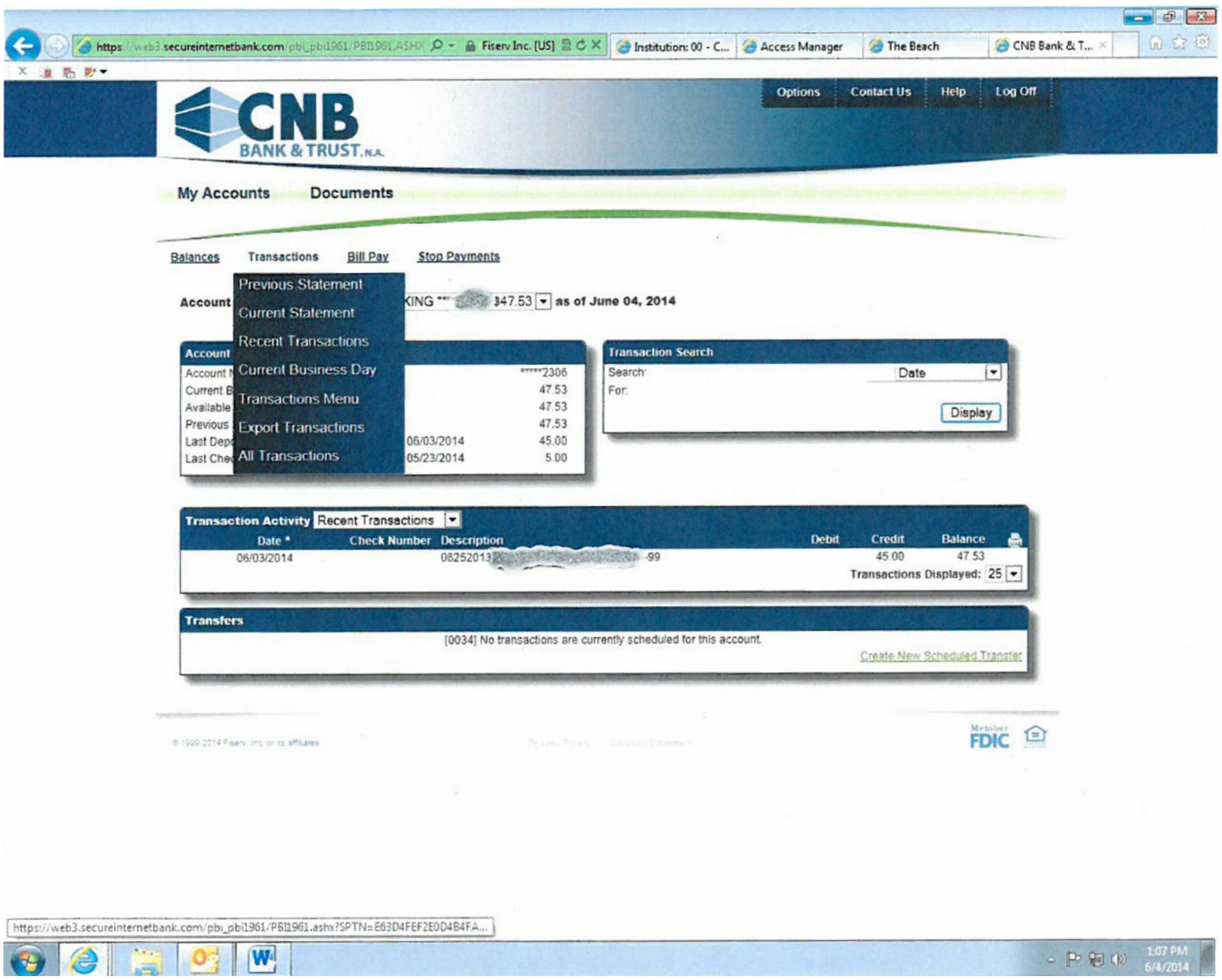
Setting Up Income & Expense Categories

For Spending Chart

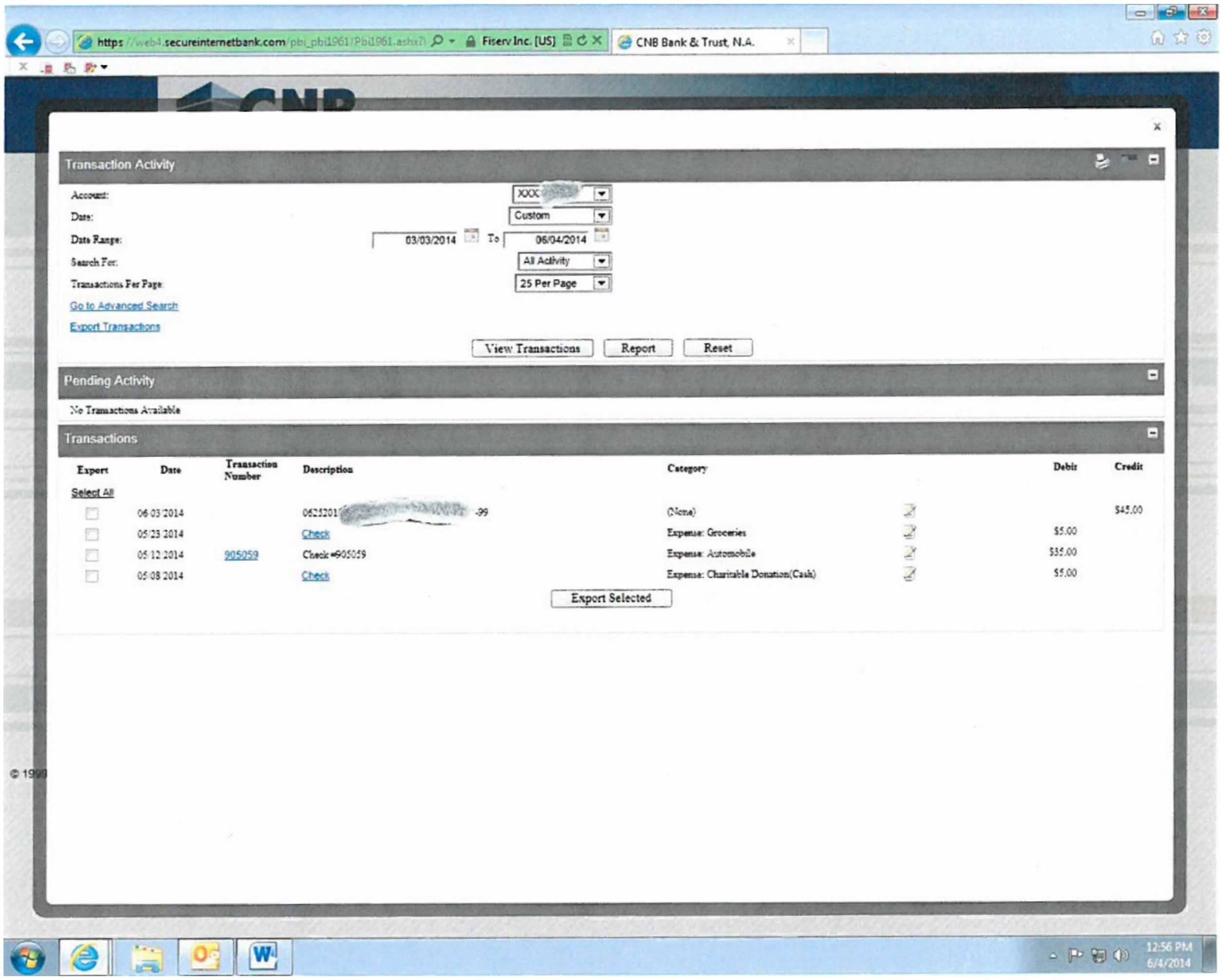
In order to create categories for the Spending Chart you must access the transaction history for the account you want to track. In the example below, we will access All Transactions and then enter a date range.

First select the checking account.

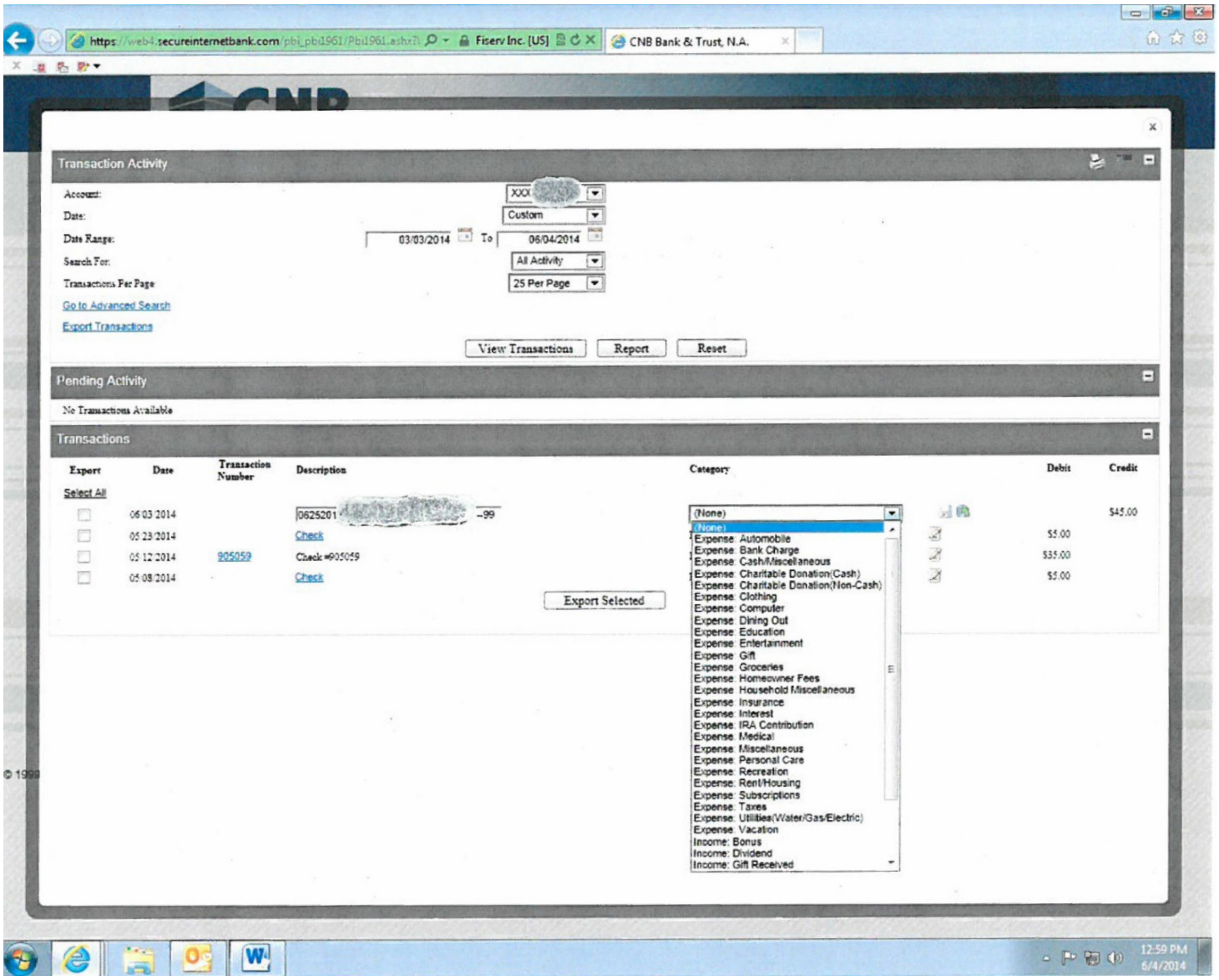
Then select All Transactions from the Transactions tab:



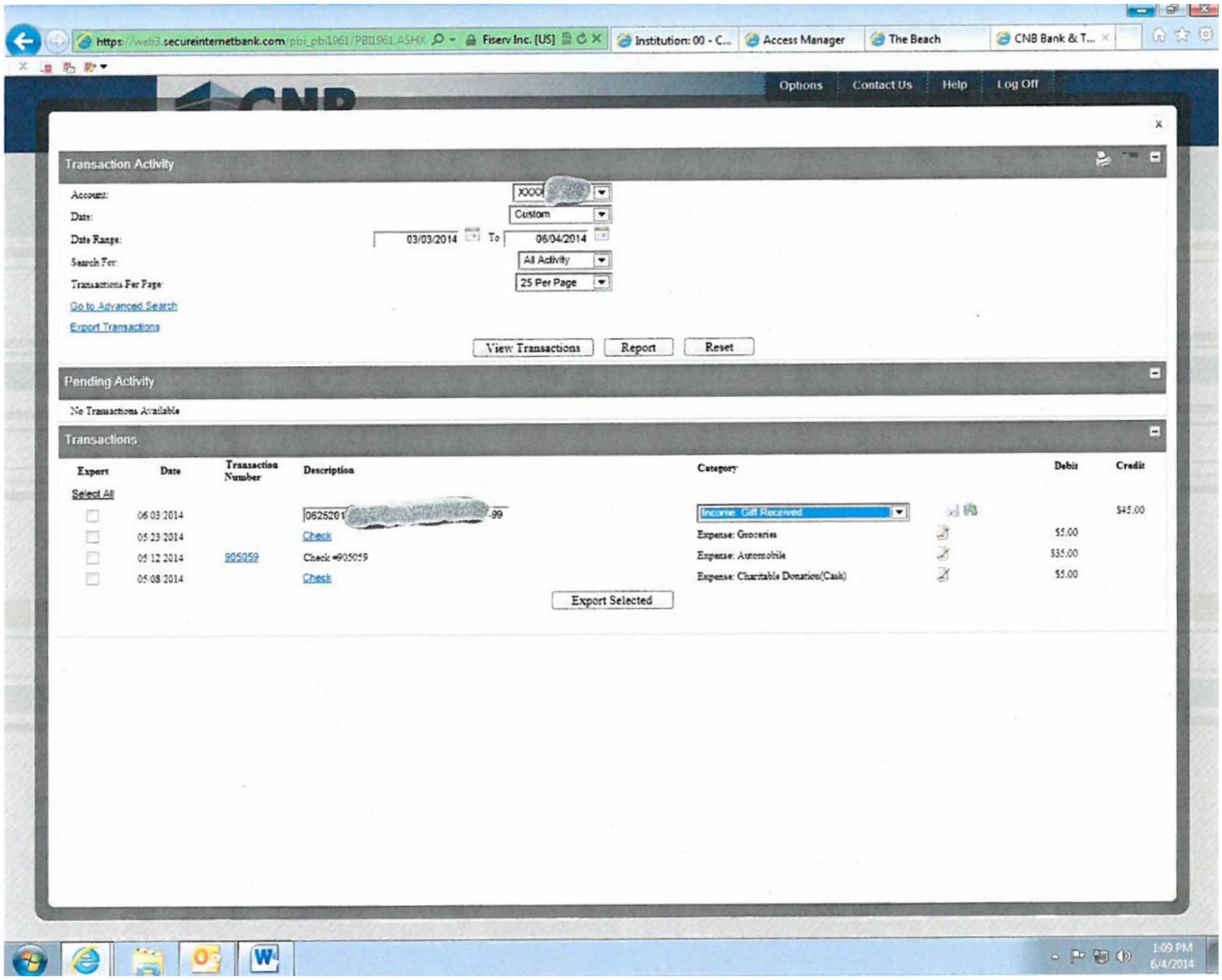
Enter the date range you want to track:



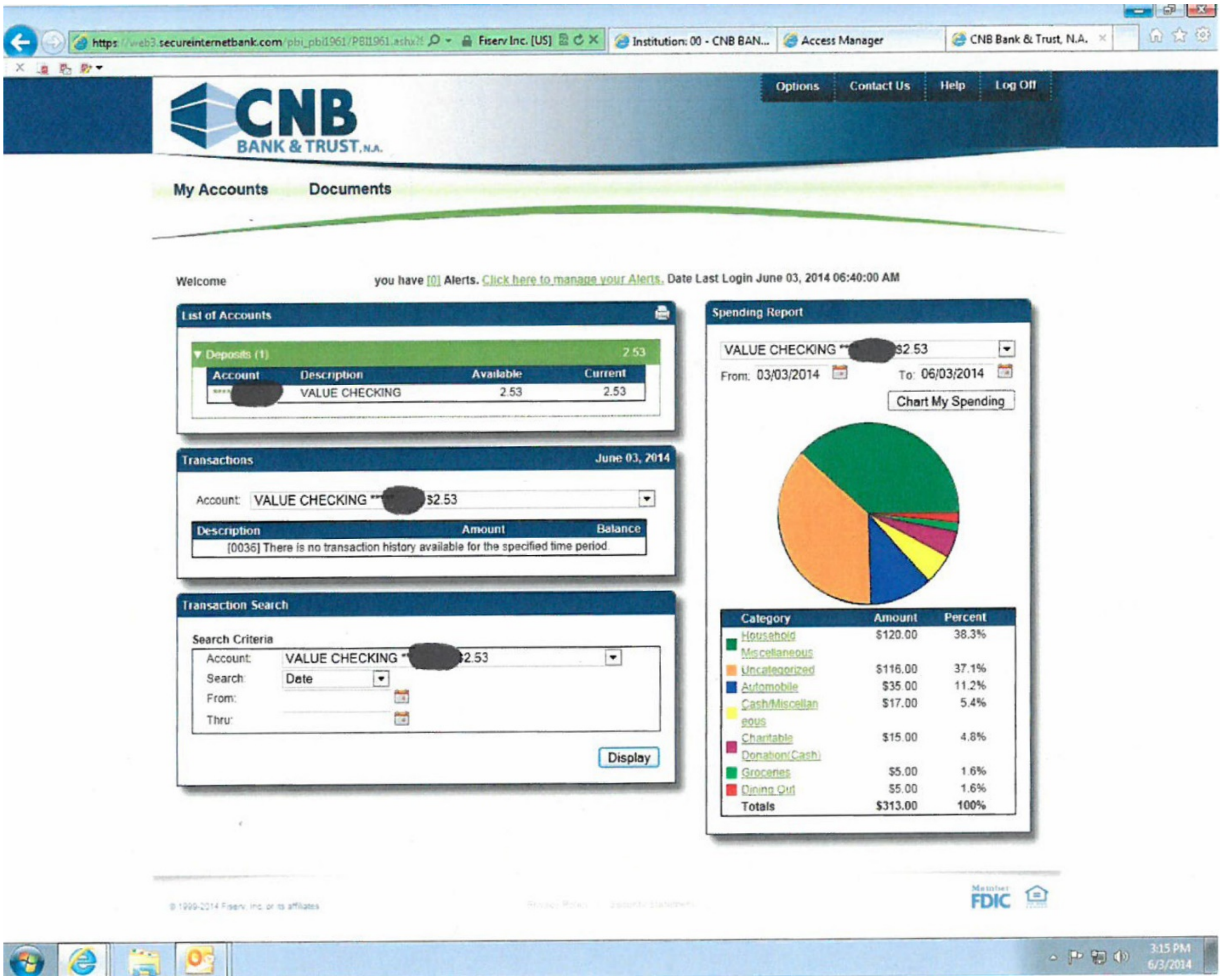
This gives you a drop down list of options for income and expenses:



Once you select the appropriate category, click the save icon (floppy disc) and the category will be saved:



If you go back to the landing page or select List of Accounts, you can enter the same date range and see a pie chart of expenses:



Currently, the Spending Report is the only report available. But Fiserv may expand the available charts with future upgrades so if you have an interest in this information it would be more beneficial to enter income categories now.