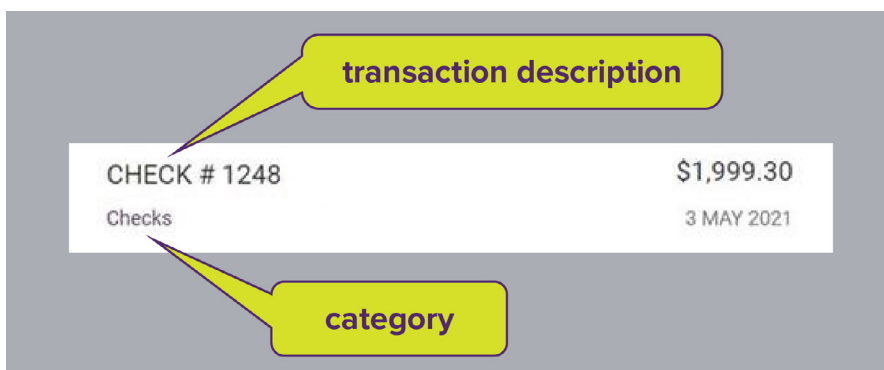![Florida Credit Union - FCU Anywhere]

Editing Transaction Descriptions and Categories Guide (Mobile Banking)

FINANCIAL WELLNESS

Open up the **Financial Wellness** widget.

To view your transactions, select **View Transactions** (located in the center of the circle).

Each transaction in the Financial Wellness widget has a transaction description and a category defining the type of transaction which has occured.

transaction description

CHECK # 1248 $1,999.30
Checks   3 MAY 2021

category

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

*Your transaction descriptions were simplified using AI in the **Financial Wellness** widget 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. Tap a transaction.
2. Tap the blue ? next to the transaction description.
3. Select the original description.
4. Select the **Update** button.

Changing a Category

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

How to Edit/Shorten Categories

1. Tap the category assigned to the transaction.
2. Tap 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 **Confirm Selection.**

NOTE: While using the mobile app, you are only able to edit categories in the **Financial Wellness** widget. You cannot edit categories in the **Accounts** widget on mobile; but you are able to make some of the above changes in both widgets when using a desktop computer.

**To learn more about the Financial Wellness widget, visit
Florida Credit Union's Mobile Banking page.**