

How To Update Transaction Label or Description



1 Navigate to **Accounts** within your digital banking platform

- Select **Transactions** and
- Select a specific transaction

The screenshot shows the 'Accounts' page in a digital banking platform. The navigation bar includes 'Dashboard', 'Accounts', 'Transfer & Pay', 'Tools', 'Quick Apply', 'Financial Planning', and 'Help & Support'. The 'Accounts' section is active, with a green circle highlighting the 'Accounts' link in the sub-navigation. Below this, there are sections for 'Checking' (3 accounts), 'Credit Cards' (1 account), and 'Loans'. The 'ReWARD Checking' account is selected, showing its current and available balances. The 'Transactions' tab is active, displaying a list of transactions with columns for 'DATE', 'DESCRIPTION', 'AMOUNT', and 'BALANCE'. Two green arrows point to the 'Xfer From *****9898' and 'Netflix' transactions, indicating the steps to update their labels or descriptions.

DATE	DESCRIPTION	AMOUNT	BALANCE
SEP 12 2024	Xfer From *****9898 Transfers	\$20.00	\$8.28
SEP 12 2024	Netflix Entertainment	-\$16.57	-\$11.72
SEP 11 2024	Withdrawal: VENMO *Mulu Tewelde Visa Direct NY U Transfers	-\$25.00	\$4.85

2 Within the transaction info, click **Dispute/Fraud (Please call 888-252-0202)**

The screenshot displays a banking application interface. At the top, there are three tabs: 'Transactions', 'Account Details', and 'Analytics'. Below the tabs is a search bar and a 'Sort By' dropdown menu set to 'Default'. There are also icons for printing and downloading. The main content area shows a transaction table with the following data:

DATE	DESCRIPTION	AMOUNT	BALANCE
SEP 12 2024	Xfer From *****9950 Transfers	\$20.00	\$8.28

Below the transaction table, there is a 'Summary' section. A link 'Dispute/Fraud (Please call 888-252-0202)' is highlighted with a green circle. The summary fields are:

- DESCRIPTION: Deposit
- ACCOUNT: ReWARD Checking *****9898
- CATEGORY: Transfers
- AMOUNT: \$20.00
- TRANSACTION MEMO: Add memo

3 Click **The transaction's simple description is incorrect.**

The screenshot displays a banking application interface. At the top, there is a search bar and a 'Sort By: Default' dropdown menu. Below this is a table of transactions. A modal dialog box titled 'Need help?' is overlaid on the screen, containing two radio button options: 'The transaction's simple description is incorrect.' (which is selected and pointed to by a green arrow) and 'I have a question about this transaction.' The dialog also features 'Cancel' and 'Select' buttons. In the background, a transaction for 'Xfer From *****9950' is visible, along with a 'Summary' section for a 'POS Withdrawal: NETFLIX COM LOS GATOS CAUS' for \$16.57 from a 'ReWARD Checking *****9898' account.

DATE	DESCRIPTION	AMOUNT
SEP 12 2024	Xfer From *****9950 Transfers	28
SEP 12 2024	Netflix Entertainment	72

Summary

DESCRIPTION	POS Withdrawal: NETFLIX COM LOS GATOS CAUS
ACCOUNT	ReWARD Checking *****9898
CATEGORY	Entertainment
AMOUNT	- \$16.57
TRANSACTION MEMO	<input type="text" value="Add memo"/>

4 Click "Original Description" if that is the correct transaction description

- Then click **Update**.

The screenshot shows a banking interface with three tabs: Transactions, Account Details, and Analytics. The Transactions tab is active, displaying a table of transactions. The first transaction is a transfer of \$20.00 on Sep 12, 2024. The second transaction is a Netflix withdrawal of \$16.57 on Sep 12, 2024. Below the table is a summary for the Netflix transaction, showing the description 'POS Withdrawal: NETFLIX COM LOS GATOS CAUS', account 'ReWARD Checking ****9898', category 'Entertainment', and amount '- \$16.57'.

DATE	DESCRIPTION	AMOUNT	BALANCE
SEP 12 2024	Xfer From *****9950 Transfers	\$20.00	\$8.28
SEP 12 2024	Netflix Entertainment	-\$16.57	-\$11.72

Summary

DESCRIPTION: POS Withdrawal: NETFLIX COM LOS GATOS CAUS

ACCOUNT: ReWARD Checking ****9898

CATEGORY: Entertainment

AMOUNT: - \$16.57

description?

We attempted to simplify your transaction description using our new AI engine so it would be easier to read, recognize, and categorize. But, we don't always get it right. If you think it is incorrect, simply choose to display the original description shown below. Your actions will help us improve the experience in the future.

Simplified Description

Netflix

Original Description

**POS Withdrawal: NETFLIX COM
LOS GATOS CAUS**