

# [EXTERNAL] How to Add a New Category for Categorizing Transactions



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**Step 1:** Log in to online banking or the mobile app using your credentials.  
[online.vermontfederal.org](https://online.vermontfederal.org)

## Step 2: Select the Account

- Choose the account that contains the transaction you want to update.
- Click on the **specific transaction** for which you want to change the category.

## Step 3: Edit the Category

- Click on the **blue hyperlink** that shows the current transaction category.

The screenshot shows a transaction list with columns for DATE, DESCRIPTION, AMOUNT, and BALANCE. A transaction on JUN 12 2025 for netflix.com CA US is shown. Below it, a transaction on JUN 12 2025 for VERMONT 275 KENNEDY DRIVE S BURLINGTON VTUS is shown with a category of Travel & Commute. A 'Summary' section for this transaction shows: DESCRIPTION: ATM Withdrawal; ACCOUNT: ReWARD Checking \*\*\*\*9898; CATEGORY: Travel & Commute; AMOUNT: -\$100.00; TRANSACTION MEMO: Add memo. A 'Dispute/Fraud' link is also visible. A 'Let's talk!' chat bubble is in the bottom right. Green arrows point to the 'Travel & Commute' category in the transaction list and the 'Travel & Commute' category in the summary section.

DATE	DESCRIPTION	AMOUNT	BALANCE
JUN 12 2025	netflix.com CA US	-\$19.25	\$ 21
JUN 12 2025	VERMONT 275 KENNEDY DRIVE S BURLINGTON VTUS Travel & Commute	-\$100.00	\$ 16

**Summary** Dispute/Fraud (Please ca [input]) X

DESCRIPTION	ATM Withdrawal
ACCOUNT	ReWARD Checking ****9898
CATEGORY	Travel & Commute
AMOUNT	-\$100.00
TRANSACTION MEMO	<input type="text" value="Add memo"/>

JUN 12 2025 AT THE AIRPO 1801 WILLISTON -\$4.00

Let's talk!

## 2 Step 4: Add a New Category

- Click the plus (+) icon to add a new category.
- Type the name of the new category and press **Enter**.

⚠️ This is a crucial step—pressing Enter confirms the new category.

The screenshot shows a mobile banking interface. On the left, a list of transactions is visible, including one for 'VERMONT 275 KENNEDY D' on JUN 12, 2025, with a category of 'Travel & Commute'. On the right, a transaction details view for 'ATM Withdrawal' on JUN 12, 2025, for an amount of -\$100.00 is shown. Below the transaction details, a category selection menu is open. The menu lists several categories: 'Auto, Commute & Travel', 'Bills & Subscriptions', 'Business Expenses', 'Cash & Transfers', and 'Education'. Under 'Auto, Commute & Travel', there are sub-categories: 'Automotive Expenses', 'Gasoline/Fuel', and 'Travel & Commute' (which is selected with a checkmark). A plus sign icon (+) is circled in green, indicating the option to add a new category. At the bottom right of the menu, there is a 'Let's talk!' button.

DATE	DESCRIPTION	AMOUNT
JUN 13 2025	POS Withdrawal: Netflix.co	
JUN 12 2025	VERMONT 275 KENNEDY D Travel & Commute	

ATM Withdrawal - \$100.00  
12 JUN 2025

- Auto, Commute & Travel
  - Automotive Expenses
  - Gasoline/Fuel
  - Travel & Commute ✓
  - + (Add New Category)
- Bills & Subscriptions
- Business Expenses
- Cash & Transfers
- Education

Applies to all future transactions that contain the description below:  
**ATM Withdrawal** ✎

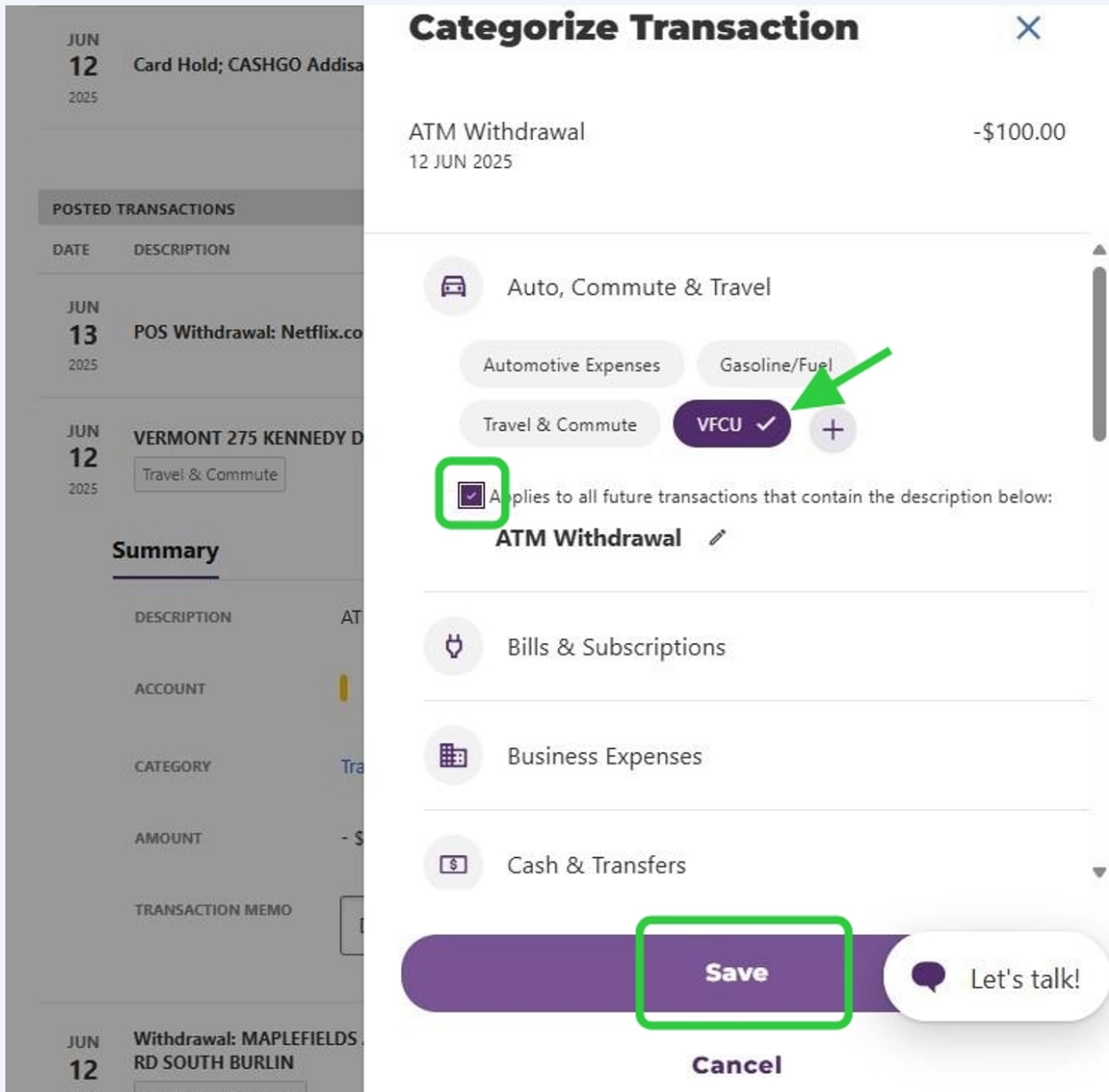
Let's talk!

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### Step 5: Apply to Future Transactions (Optional)

If you want this new category to be automatically applied to all future transactions with the same description:

- Check the box labeled something like **“Apply to all future transactions with this description.”**
- Click **Save**



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If you have any questions or need further assistance, please reach out to the call center team (888) 252-0202. Thank you!