

Farmers Bank
My Spending FAQ

1. What is My Spending?

The My Spending tab gives you ways to monitor your spending from Online Banking accounts to better manage your money. Using My Spending, you can easily see how much you have spent over time and where your money is going. You can even set up alerts to notify you when your spending begins to exceed limits that you have specified.

2. What happened to my custom categories (retail user)?

With our new release we have introduced a more succinct categorization method and your transactions have been mapped when possible to the new categories. Any transactions previously assigned in your custom categories were mapped to the "Other" category. Your custom categories are not available now but you can add up to 5 custom categories in addition to the new categories. You can still add memos to transactions and your previous memos were all retained.

3. What happened to my previous transaction categorizations (retail user)?

With our new release we have introduced a more succinct categorization method and your transactions have been mapped when possible to the new categories and any in custom categories you had created were mapped to the "Other" category. You may still add memos to transactions and your previous memos were all retained.

4. Will my categories I currently have disappear?

Yes, but if you have several different categories you need to keep, please contact us prior so we can take you out of the Retail User Group.

5. Why is the transaction description so short now?

That is our new description cleansing process giving you a much more user-friendly description. You can still see the full description by clicking the ellipses and seeing it in the transaction description modal. If you think the short description is not adequate you can modify it and as you make the same consistent change over time the system will learn what you want it to be for this specific transaction.

6. How do I categorize a transaction for one of my checking accounts?

In the Account Activity section or in the My Spending history section simply use the drop down to change your category. By the way - the system will learn if you consistently change a transaction.

7. If this is a real budgeting tool, can I pull in my other accounts from other institutions and credit card companies?

Yes, Accounts can be synced from most financial institutions, including data from checking and savings accounts, loans, credit cards, investments, and more.

8. I have multiple accounts with an outside institution, but only some were imported. How can I add the missing accounts?

Most connections will import all accounts that you have with a financial institution. However, some institutions will have different connections for different account types. This means that if you have several accounts with an institution, such as checking account, a loan, and a credit card, you may need to search for and add each account connection individually. This can typically be seen with mortgages, loans and credit cards at banks and credit unions.

9. How do I fix an account that is having a problem syncing?

Next to the failing account, click on the "Repair Sync Now" icon to open the Connections view. Follow the steps on the screen to repair the account. This typically includes refreshing the account, re-entering your login credentials, or logging into your account in a separate tab or window to resolve connection issues at the outside institution's website.