

ANZ Transactive – Global Checklist

For customers banking in Indonesia and Taiwan upgrading to ANZ Transactive – Global.

A series of post-upgrade activities and checks to ensure that your ANZ Transactive – Global set-up is optimised for efficient use.

Category	Task 1	Task 2	Task 3
Applications	<input type="checkbox"/> Indonesia: confirm you can access ANZ Online from the Applications menu in ANZ Transactive – Global	<input type="checkbox"/> Taiwan: confirm you can access ANZ Transactive APEA from the Applications menu in ANZ Transactive – Global	
Payments	<input type="checkbox"/> Visibility of the Asia & Pacific Payments menu in ANZ Transactive – Global	<input type="checkbox"/> Recreate any future-dated payments from ANZ Transactive Cash Asia	<input type="checkbox"/> Download any required past payment reports from ANZ Transactive Cash Asia
Beneficiaries and Templates	<input type="checkbox"/> Verify details of your migrated beneficiaries from ANZ Transactive Cash Asia from the Asia & Pacific Payments > Beneficiaries menu	<input type="checkbox"/> Create new templates in ANZ Transactive – Global	
Scheduled reports	<input type="checkbox"/> Create and schedule your balance and transaction reports from the Accounts > Reports menu	<input type="checkbox"/> Create and schedule your payment grid reports from the Asia & Pacific Payments > Reports menu	
System settings and customisation	<input type="checkbox"/> Set user-specific settings including date format, time zone and report retrieval code (for emailed reports)	<input type="checkbox"/> Add widgets to the Workspace and/or set another preferred landing page as your home screen	<input type="checkbox"/> Customise grid screens by managing columns, creating folders etc.
Help and support	<input type="checkbox"/> Bookmark ANZ Digital Services Help and Status Page	<input type="checkbox"/> Watch and subscribe to ANZ Transactive – Global instructional videos	<input type="checkbox"/> View ANZ Transactive – Global training webinars and register for future sessions

For more information visit ANZ Digital Services Help

<https://help.online.anz.com/hc/en-au/articles/40705700602649-Get-Ready-for-your-move-from-ANZ-Transactive-Cash-Asia-Indonesia-Taiwan>

