ANZ TRANSACTIVE – GLOBAL QUICK REFERENCE GUIDE UPGRADE

This Guide has been designed to assist users in upgrading to ANZ Transactive – Global. The upgrade process is slightly different depending on your logon method. Follow the appropriate step-by-step instructions.

1. UPGRADE FOR PASSWORD USERS

STEP	ACTION					
1	Go to the ANZ Transactive Log on page and enter your U and User ID .	welcome to ANZ Transactive				
2	Enter your Password and click the Log on button.	Log on				
	Result: A confirmation that you have been upgraded to <i>r</i> Transactive – Global will be displayed.	ANZ User Group: User ID: Mandatory fields for all users.				
		Password users Password: Log on Forgotten your password? Speak to your local administrator. Security device users				
		Log on 🔒				
3	Enter and Confirm a New Password* .	ANZS				
	Passwords must:					
	> Contain at least eight characters, and	You have been upgraded to ANZ Transactive - Global				
	 Include at least two alphabetic characters, one upper case, one lower case and two numbers 	For security purposes you are required to create a new password. Passwords must contain at least eight characters, including at least two alphabetic characters, one upper case, one lower case and two numbers.				
	Click Submit.					
	Result: A confirmation screen will be displayed.	Please set your password below: 3 New Password: * Confirm New Password: *				
		Click 'Submit' to save your password.				
4	Take note of your ANZ Transactive - Global User ID as it may have changed.	ANZ				
	Click Continue .	Password successfully set				
	Result: You will be redirected to the ANZ Transactive – Global logon page.	Your new password has been set and will now be used with the User ID below to log on to ANZ Transactive - Global or ANZ Transactive - Global User ID is: CITIZENJ Please take note of your User ID for ANZ Transactive - Global: "If you have a security device, it may have been linked to this User ID. "Your new password applies to security devices or any other ANZ application that requires the above User ID. You will be re-directed to the ANZ Transactive - Global log on page after clicking 'Continue'. For future access you will need to bookmark the ANZ Transactive - Global home page or alternatively go to anz com/corporate and select ANZ Transactive - Global form the application ist.				
		Continue				

*If you use the ANZ Transactive Mobile App and log into it *before* upgrading via the web solution, the Mobile App will prompt you to update your password. Please note that you will still be taken through the upgrade steps upon next log on to the web solution.



5	Your User ID will be automatically populated. As this is your new logon page we recommend you save this page to your Favourites to replace your old ANZ Transactive - AU & NZ link. Click Submit. Result: The ANZ Transactive – Global authentication page is displayed.	Did you know?
		if you are on a shared or public computer.
6	Enter your credentials.	

Result: The ANZ Transactive – Global Homepage is displayed.

2. UPGRADE FOR TOKEN OR SMARTCARD/SMART USB USERS

STEP	ACTION						
1	Go to the ANZ Transactive Log on page and enter your User Group and User ID .	Log on User Group: * User ID: * *Mandatory fields for all users.					
2	Click the Log On button in the Security device users section.	Security device users					
3	Smartcard/USB users: Enter your PIN and click OK.						
	Token users: Enter your password and Token OTP and click Log On.						
	Result: A confirmation box is displayed.						
4	Take note of your ANZ Transactive - Global User ID as it may have changed.	ANZ					
	Click Continue.	You have been upgraded to ANZ Transactive - Global					
	Result: You will be redirected to the ANZ Transactive – Global logon page. You can now access multiple ANZ arguations and services in one place, with one set of security credentials. Your ANZ Transactive - Global User ID is CITIZENT) Plase take note of your User ID to optimer with your existing password or security device, will now be used to log on to ANZ Transactive - Mobile. You will be redirected to the ANZ transactive - Global log on page after clicking 'Continue'. You will be redirected to the ANZ transactive - Global home page or alternatively go to anz com/corp select ANZ Transactive - Global from the application list.						
5	Your User ID will be automatically populated.	ANZ					
	As this is your new logon page we recommend you save this page to your Favourites to replace your old ANZ Transactive - AU & NZ link.	Did you know?					
	Click Submit.	User ID' will store					
	Result: The ANZ Transactive – Global authentication page is displayed.	 Source of the second sec					
6	Enter your credentials.						

Enter your credentials.

Result: The ANZ Transactive – Global Homepage is displayed.



3. BROWSER SUPPORT

- > Ensure compatibility mode is not enabled within Internet Explorer and the URL has been added to the Trusted Sites
- > For further information on how to do this, refer to the ANZ Transactive Global Troubleshooting Guide

4. ACCESSING PAYMENTS

To access payments, simply click on Menu > My Applications > ANZ Transactive – AU & NZ.





5. BALANCE & TRANSACTION REPORTS

Use the table below to find where you can view information and run reports from within ANZ Transactive – Global. The table also provides you with mapping of the old and new report names.

ANZ TRANSACTIVE – AU & NZ	ANZ TRANSACTIVE – GLOBAL	ANZ TRANSACTIVE – GLOBAL SCREEN (Where reports can be created or details viewed)							
	Operating Accounts								
Report Name	Report/File Name	Net Position	Operating Accounts	Account Activity	Balance Summary	Returned Items	Transaction Search	Report Profiles	Scheduled Reports
Statement	Account Statement Report		\checkmark	\checkmark	\checkmark			\checkmark	\checkmark
Transaction Details	Transaction Detail Report			\checkmark			\checkmark	\checkmark	\checkmark
Daily Balance	Account Summary Report		\checkmark	\checkmark	\checkmark			\checkmark	\checkmark
Balance History	Balance Summary Report		\checkmark	\checkmark	\checkmark			\checkmark	\checkmark
Returned Payments	Returned Items Payment Report			\checkmark	\checkmark	\checkmark		\checkmark	\checkmark
Returned Cheques	Returned Items Cheque Report			\checkmark	\checkmark	\checkmark		\checkmark	\checkmark
-	Returned Items File			\checkmark	\checkmark	\checkmark		\checkmark	\checkmark
Transaction Summary	-						√*		
Balance Enquiry	-		\checkmark	\checkmark	\checkmark				
Current Day Transaction	-			\checkmark					
Transaction Summary with record Vouchers	-			\checkmark					
-	Net Position View Report	\checkmark						\checkmark	\checkmark
-	Daily Account Statement Report							\checkmark	
-	Monthly Account Statement Report							\checkmark	
-	Daily Account Summary Report							\checkmark	
-	Monthly Balance Summary Report							\checkmark	

* create a Save Search in the Transaction Search screen to produce a similar report.

NEED HELP?

For further assistance, please contact your local Customer Service Centre. Details can be found at www.anz.com/servicecentres.

