



Anglican Investment & Development Fund

ONLINE USER GUIDE
FOR ONLINE TRANSACTION
SERVICES



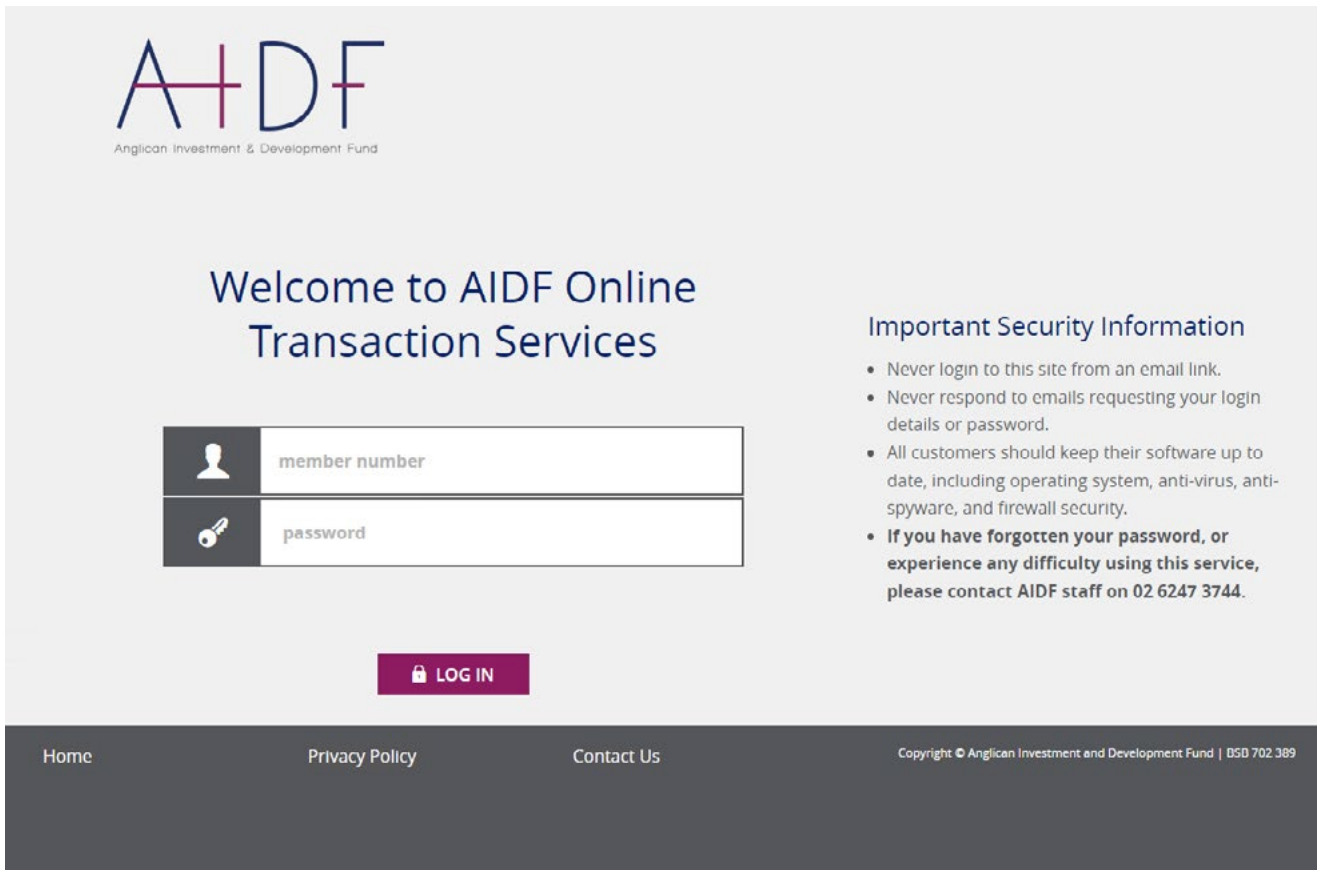
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LOGIN

Enter your **member number** into the first field, and then enter your chosen **password** or the password that has been provided to you, into the second field and click **Login**.



If you are unsure of your member number or password, please contact us.




The screenshot shows the login interface for the Anglican Investment & Development Fund (AIDF). At the top left is the AIDF logo with the text "Anglican Investment & Development Fund" below it. The main heading reads "Welcome to AIDF Online Transaction Services". Below this is a login form with two input fields: the first is labeled "member number" and the second is labeled "password". A "LOG IN" button with a lock icon is positioned below the form. To the right of the form is a section titled "Important Security Information" containing three bullet points. The footer includes links for "Home", "Privacy Policy", and "Contact Us", along with a copyright notice: "Copyright © Anglican Investment and Development Fund | BSD 702.389".

AIDF
Anglican Investment & Development Fund

Welcome to AIDF Online Transaction Services

	member number
	password

 LOG IN

Important Security Information

- Never login to this site from an email link.
- Never respond to emails requesting your login details or password.
- All customers should keep their software up to date, including operating system, anti-virus, anti-spyware, and firewall security.
- **If you have forgotten your password, or experience any difficulty using this service, please contact AIDF staff on 02 6247 3744.**

Home Privacy Policy Contact Us Copyright © Anglican Investment and Development Fund | BSD 702.389

Setting up your Password

After you login for the first time, you will be automatically prompted to choose a new password. Remember not to choose a password that is the same as your member number or that is sequential letters or numbers.

To maintain security, your chosen password must comply with below:

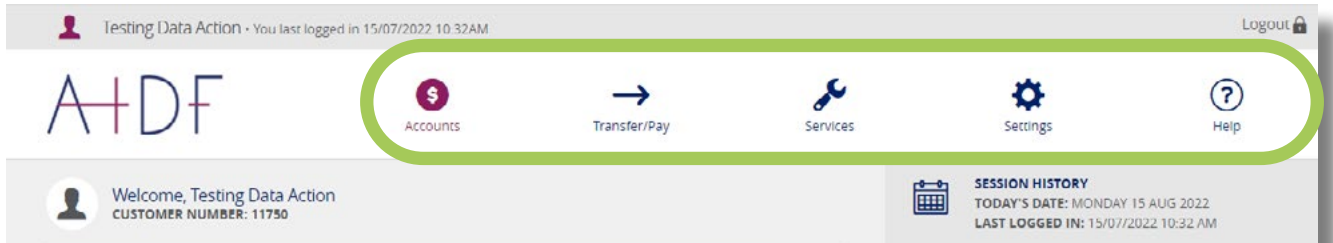
- Must be between 8 and 16 characters long
- Must contain both letters and numbers
- Must be different to your previous 5 passwords
- Should not contain part of your name or your date of birth
- Must not contain your member number

When you have selected a password that is suitable, click **Change Password** followed by **Continue**.

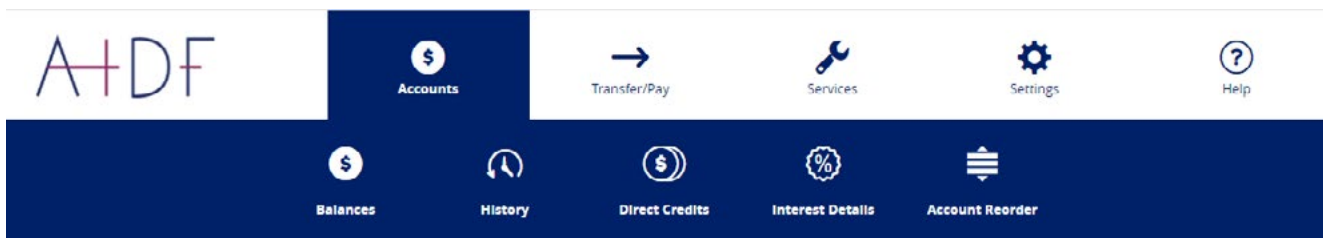
The image displays two screenshots of the A+DF (Anglican Investment & Development Fund) 'Change Password' interface. The top screenshot shows the initial form with a red error bar at the top stating 'Password change required.' Below this, the text 'Your new password:' is followed by a list of requirements: 'Must be between 8 and 16 characters long', 'Must contain both letters and numbers', 'Must be different to your previous 5 passwords', 'Should not contain part of your name or your date of birth', and 'Must not contain your member number'. Below the list are three input fields labeled 'Current Password', 'New Password', and 'Confirm Password'. A purple 'CHANGE PASSWORD' button is located at the bottom right of the form. The bottom screenshot shows the same interface after a successful password change. A green success bar at the top states 'Password has been changed successfully! Testing Data Action - 11750'. The 'CHANGE PASSWORD' button is now a dark blue 'CONTINUE' button. A green arrow points from the 'CHANGE PASSWORD' button in the top screenshot to the 'CONTINUE' button in the bottom screenshot, indicating the flow of the process.

MENU OPTIONS

The top row displays menu item. When selected you will be shown a sub-menu of items to choose from.



Accounts Menu



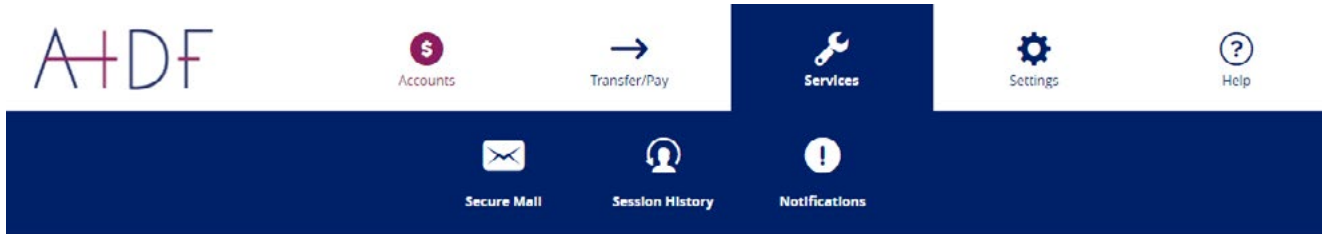
- | | |
|-------------------------|--|
| Balances | View your current account balances. |
| History | Transaction history of accounts. |
| Direct Credits | Direct Credits received. |
| Interest Details | Interest received on each account. |
| Account Reorder | Change the order of your accounts displayed on your accounts page. |

Transfer/Pay Menu



- | | |
|----------------------------|---|
| Transfer | Between your own accounts. |
| Pay Member | Transfer money to another account held with the AIDF. |
| Pay Anyone | Transfer money to accounts held at other financial institutions. |
| BPay | Pay a bill using BPay. |
| Scheduled Transfers | View your current scheduled transfers. |
| Bulk Transfer | Bulk transfers MUST be used for accounts that have two (2) signatories. |

Services Menu

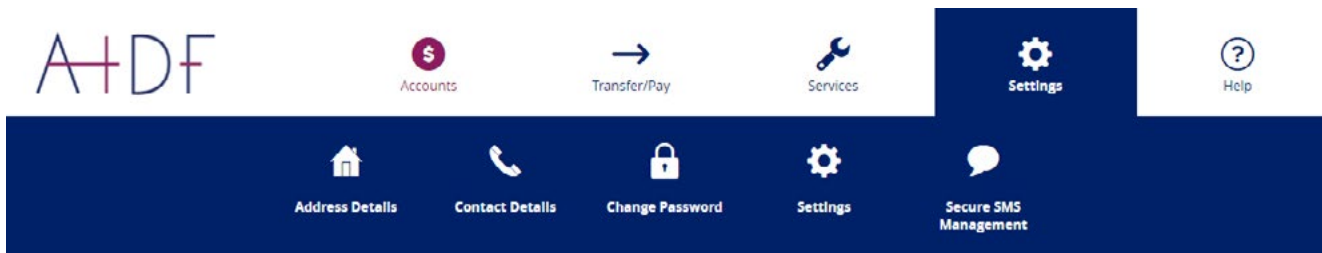


Secure Mail Compose and send a secure email for all general enquiries to us.

Session History History log of sessions.

Notifications Options to receive notifications for certain actions.

Settings Menu



Address Details Update your address details.

Contact Details Update your contact details.

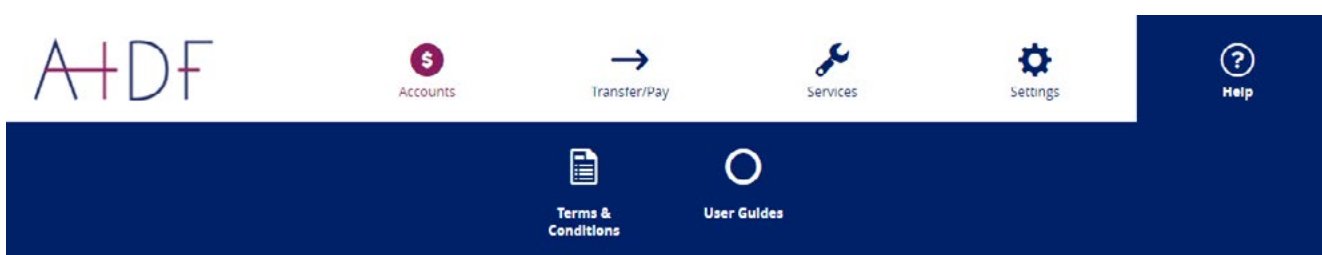
Change Password Change your password.

Settings Choose your preferred account.

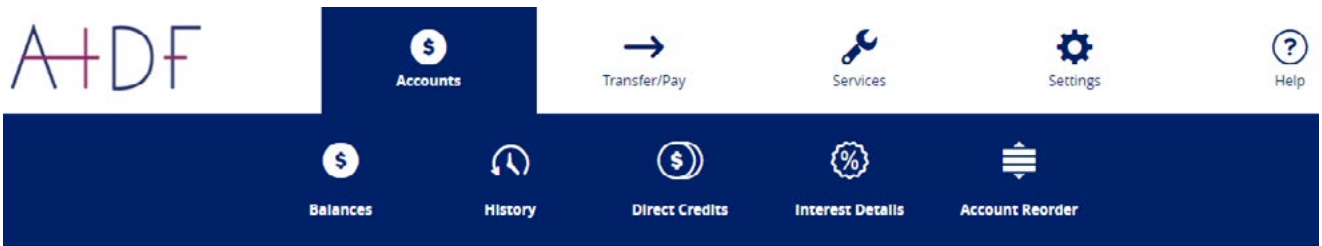
Secure SMS Management Set up Secure SMS Management (see page X).

Help Menu

View and read our Terms & Conditions and User Guides for Online Transaction Services.

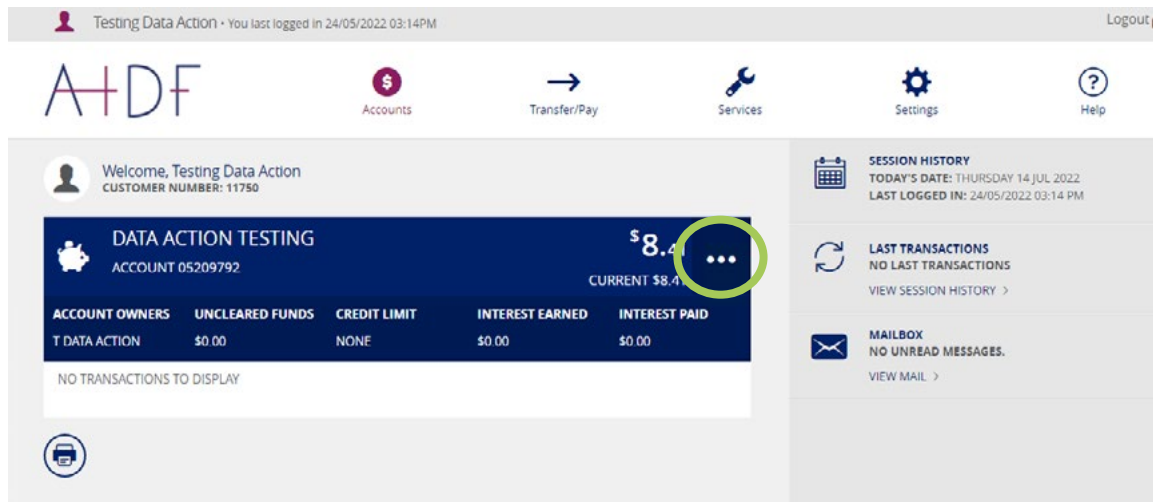


ACCOUNTS MENU



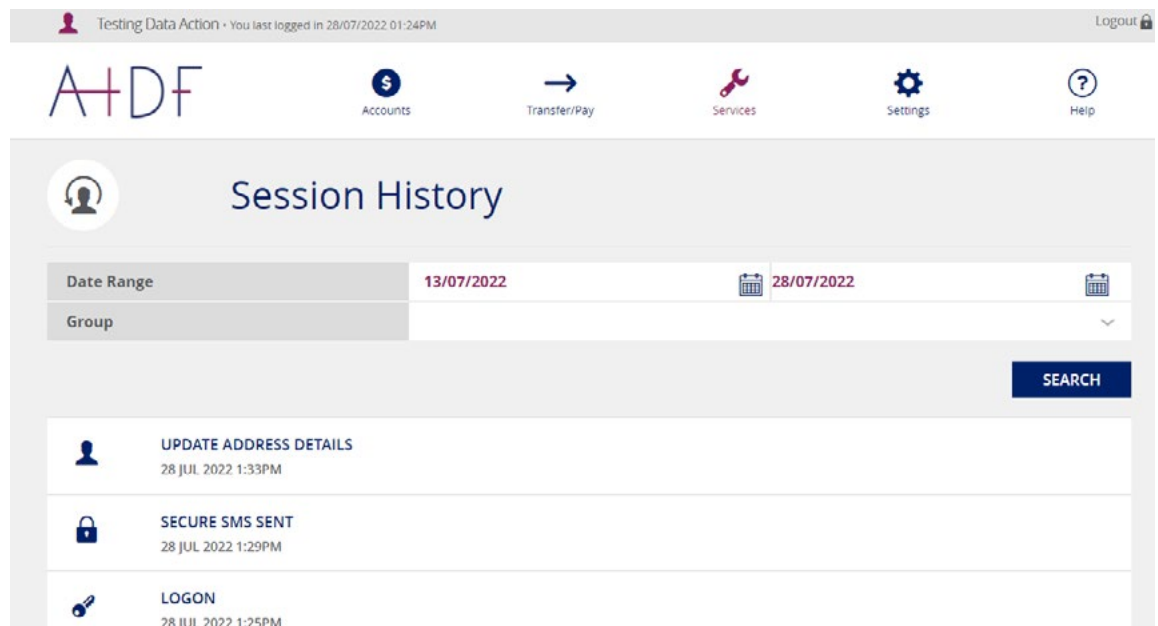
Balances

The three dots (...) beside each account displays quick click options to process a Transfer/BPAY.



History

You can check all of your session history and changes made.





Direct Credits

View your accounts direct credits.

A+DF Accounts Transfer/Pay Services Settings Help

Direct Credits

No details available



Interest Details

View your interest details for each account held with AIDF.

A+DF Accounts Transfer/Pay Services Settings Help

Interest Details

For interest YTD on closed accounts please refer to your end of financial year statement or e-statement.

FINANCIAL YEAR TO DATE 2022/23
1 JUL 2022 - 30 AUG 2022

PREVIOUS FINANCIAL YEAR 2021/22
1 JUL 2021 - 30 JUN 2022

ACCOUNT	EARNED	PAID	TAX
---------	--------	------	-----



Account Reorder

Reorganise your account display order.



A+DF Accounts Transfer/Pay Services Settings Help

DATA ACTION TESTING
ACCOUNT 05209792


CURRENT \$8.41

SAVE ORDER


TRANSFER/PAY MENU




Accounts




Transfer/Pay




Services




Settings




Help




Transfer




Pay Member




Pay Anyone



BPAY



Scheduled Transfers




Bulk Transfers



Transfer


Transfer money between your **own accounts**.




Transfer

Transfer money between your own accounts. [MORE INFORMATION](#)

FROM

 DATA ACTION TESTING ACCOUNT 05209792	\$8.41 CURRENT \$8.41
---	--------------------------

TO

 DATA ACTION TESTING ACCOUNT 05209792	\$8.41 CURRENT \$8.41
---	--------------------------

You can not transfer to the same account. Please try again.


Reference	Will appear on your statement
Amount	\$

[SCHEDULE PAYMENT](#) [PAY NOW](#)




Pay Member

Transfer money to **another AIDF account**.



Pay Member

Please note: Payments made to other members are processed immediately and will be available in the payees account straight away.

 DATA ACTION TESTING ACC. 05209792	\$8.41 CURRENT \$8.41
--	--------------------------

Description	Optional e.g. Rent or John Smith
Account No.	e.g. 12345678
Pay To	First 3 characters of last name ?
Reference	Will appear on payee's statement
Email	Optional ?

[ADD TO FAVOURITES](#) ✓

Amount	\$
--------	----

[SCHEDULE PAYMENT](#) [PAY NOW](#)

Favourites [Search](#)


Sort By **Description**

No saved payees found.



Pay Anyone

Transfer money to **another bank institution**.



Pay Anyone

Note: Please check the BSB and Account number you have entered. Money paid to the wrong account as a result of you entering an incorrect BSB or Account number may not be able to be recovered.

[MORE INFORMATION](#)

DATA ACTION TESTING \$8.41


ACC. 05209792 CURRENT \$8.41

Description	Optional e.g. Rent or John Smith
BSB	e.g. 123456
Account No.	Last 9 digits only (i)
Pay To	Payee Name
Reference	Will appear on payee's statement
Email	Optional (i)


[ADD TO FAVOURITES](#) ✓

Amount

[SCHEDULE PAYMENT](#) **PAY NOW**

Favourites Search 

Sort By **BSB** ▼




Test ...

AIDF: BSB: 032-719 ACC: 325697
Last: \$1.00 12 Sep 2017



BPay

Pay a bill using **BPay**.



BPAY

Please note: BPAY® payments performed after 6pm on a business day, weekend or public holiday will be processed the following business day.

DATA ACTION TESTING \$8.41


ACC. 05209792 CURRENT \$8.41

Description	e.g. Electricity Bill
Bill Code	
Customer Ref No.	(i)

[ADD TO BILLERS](#) ✓

Amount

[SCHEDULE PAYMENT](#) **PAY NOW**

Favourites Search 

Sort By **Billers Name** ▼

No saved payees



Scheduled Transfers

View all scheduled transfers pending.



Scheduled Transfers

No scheduled transactions found



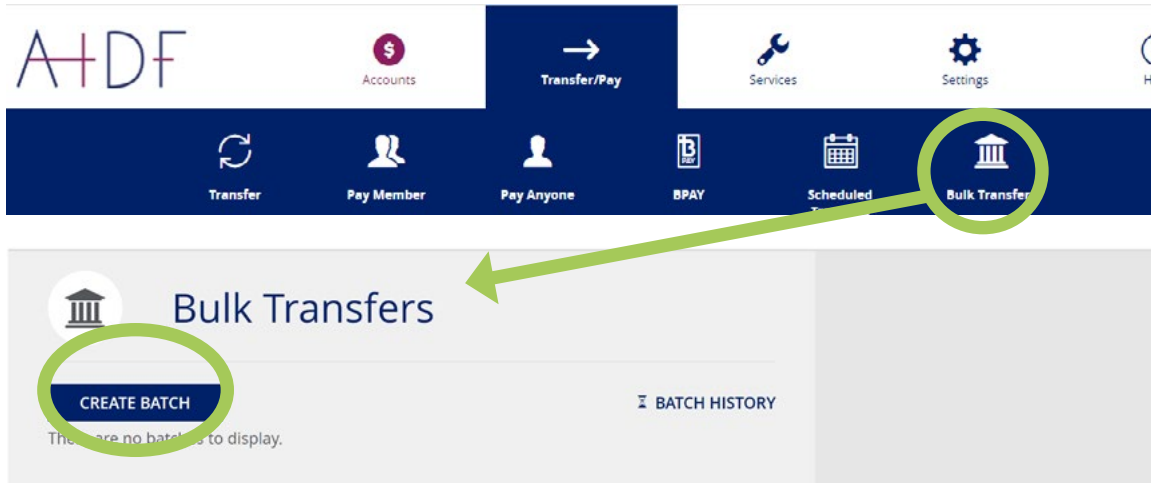


Bulk Transfer

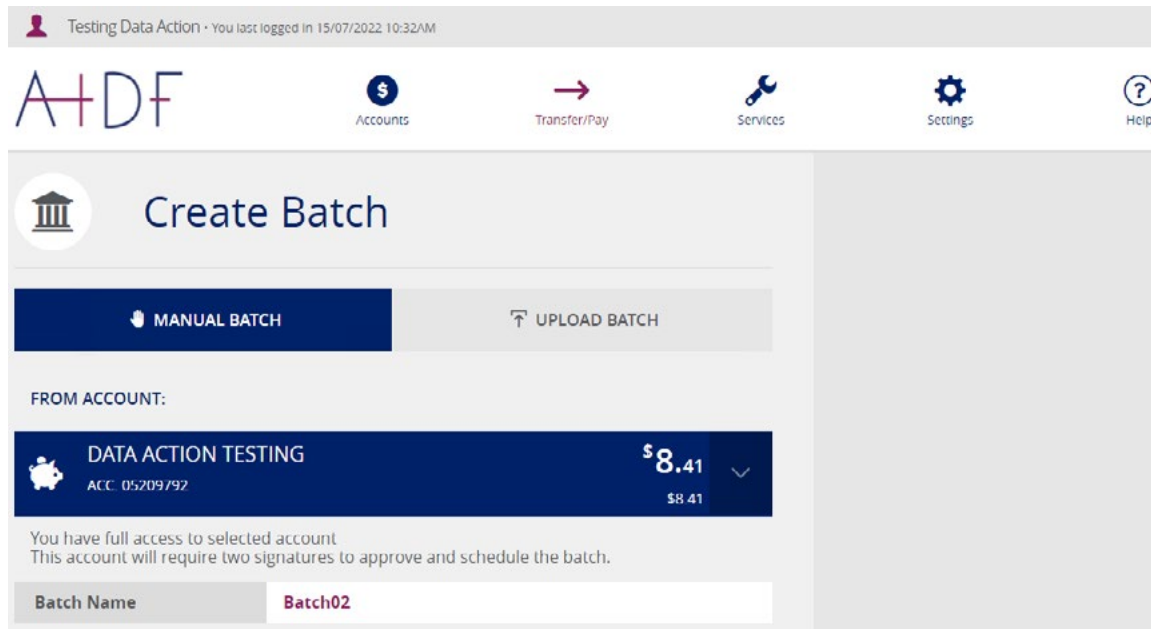
For accounts that hold two (2) signatories, you **MUST** use the **Bulk Transfers** option under the **Transfer/Pay** tab only.

This allows you to set up a payment/s for two (2) signatories to authorise.

Select **Bulk Transfers** under the **Transfer/Pay** and click **Create Batch**.



The next webpage (as shown below) will allow you to either **Upload a Batch** for payroll/multiple payments, or create a **Manual Batch** by adding each payment in.



Manual Batch

Once you have created the batch, you will need to add your payments by selecting **Add Payment** to display the transfer options. Choose the relevant option.

Testing Data Action · you last logged in 15/07/2022 10:32AM

AIDF Accounts Transfer/Pay Services

Bulk Transfers (Details)

< BACK

BATCH02
FROM ACC. 05209792
NEW
\$0.00
0 PAYMENTS

CREATOR 11750 DATA ACTION, T ON 15/08/2022 02:05 PM

DATA ACTION TESTING
ACC. 05209792
CURRENT \$8.41

You have full access to this account
This account will require two signatures to approve and schedule the batch.

SAVE

ADD PAYMENT

TRANSFER MEMBER ANYONE BPAY

Transfer

Between your own accounts.

Pay Member

Transfer money to another account held with the AIDF.

Pay Anyone

Transfer money to accounts held at other financial institutions.

BPay

Pay a bill using BPay.

Fill in all the details and select **Create Payment** then check all the details are correct and select **Confirm**.

Pay Anyone
Create new Pay Anyone transaction and add it to a batch.

FROM DATA ACTION TESTING
05209792

Description	Test
BSB	032719
Account No.	325697
Pay To	AIDF
Reference	Test Transfer

ADD TO FAVOURITES ✓

Amount **\$1.00**

BACK TO BATCH CREATE PAYMENT

Pay Anyone
Create new Pay Anyone transaction and add it to a batch.

FROM DATA ACTION TESTING
05209792

DESCRIPTION	TEST
BSB	WBC - PETRIE PLAZA CANBERRA - 032719
ACCOUNT NO.	325697
PAY TO	AIDF
REFERENCE	TEST TRANSFER

AMOUNT **\$1.00**

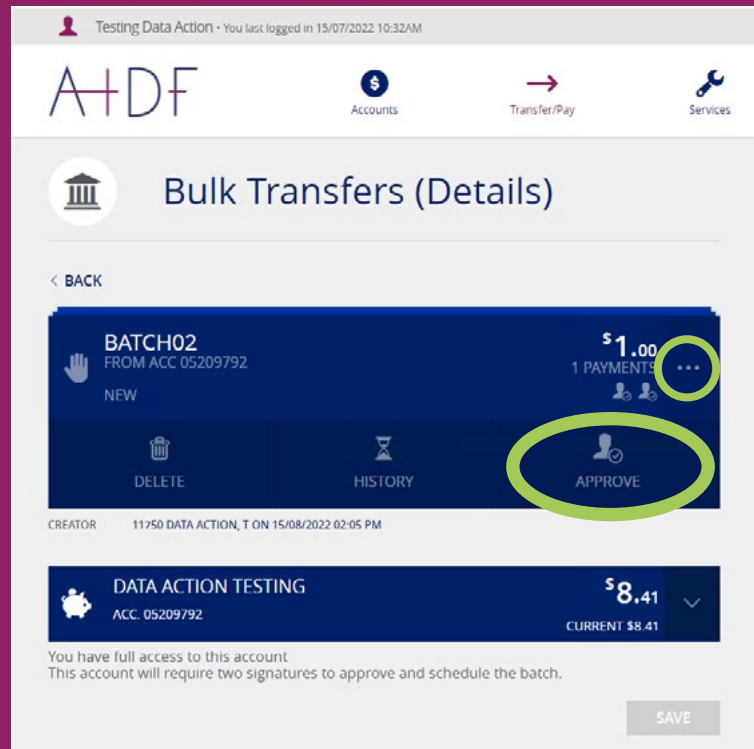
< EDIT PAYMENT CONFIRM

Return to your batch, repeat this process to add more payments, if required.

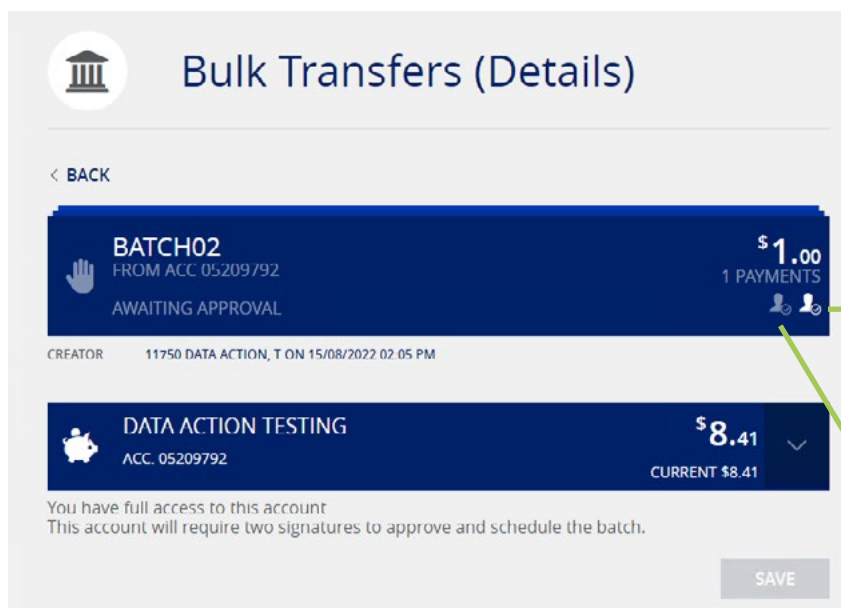
NOTE
YOU NEED TO **APPROVE** THE BATCH AFTER YOU CREATE IT!

After you have created all the payments and the batch is complete. You will need to **Approve** of the transfer as the first signatory.

Select the three dots (...) next to the Batch and select **Approve**.



Once you have approved the batch it will show as *Awaiting Approval*. Advise the other signatory to login and review/authorise the batch in order for it to be processed.



Batch has been approved by a signatory.

Awaiting a second signatory to authorise the batch.

SECOND SIGNATORY APPROVAL

A second signatory will be notified when they login to their AIDF account of a batch awaiting approval. The three dots display several options to view/edit, cancel and view history log.

To approve of the batch, select Process. The second signatory will need to be set up for SMS code validation in order to process the batch. If this is not set-up please refer to page X for instructions, or alternatively, follow the prompts.

Once you have requested and received your validation code. Place the code into the field and select **Process**.

Testing Data Action • You last logged in 15/07/2022 10:32AM

AIDF Accounts Transfer/Pay Services

Bulk Transfers (Details)

< BACK

BATCH02
FROM ACC 05209792
NEW

\$1.00
1 PAYMENTS

DELETE HISTORY APPROVE

CREATOR 11750 DATA ACTION, T ON 15/08/2022 02:05 PM

DATA ACTION TESTING
ACC. 05209792

\$8.41
CURRENT \$8.41

You have full access to this account
This account will require two signatures to approve and schedule the batch.

SAVE

SERVICES MENU

AIDF

Accounts

Transfer/Pay

Services

Settings

Help

Secure Mail

Session History

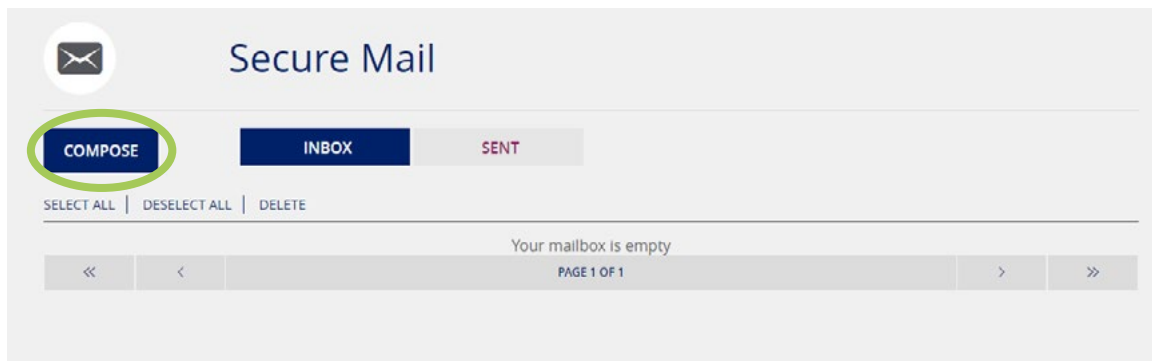
Notifications



Secure Mail

A secure mailing system allows communication between yourself and the AIDF team. You will be able to view any correspondence sent or received.

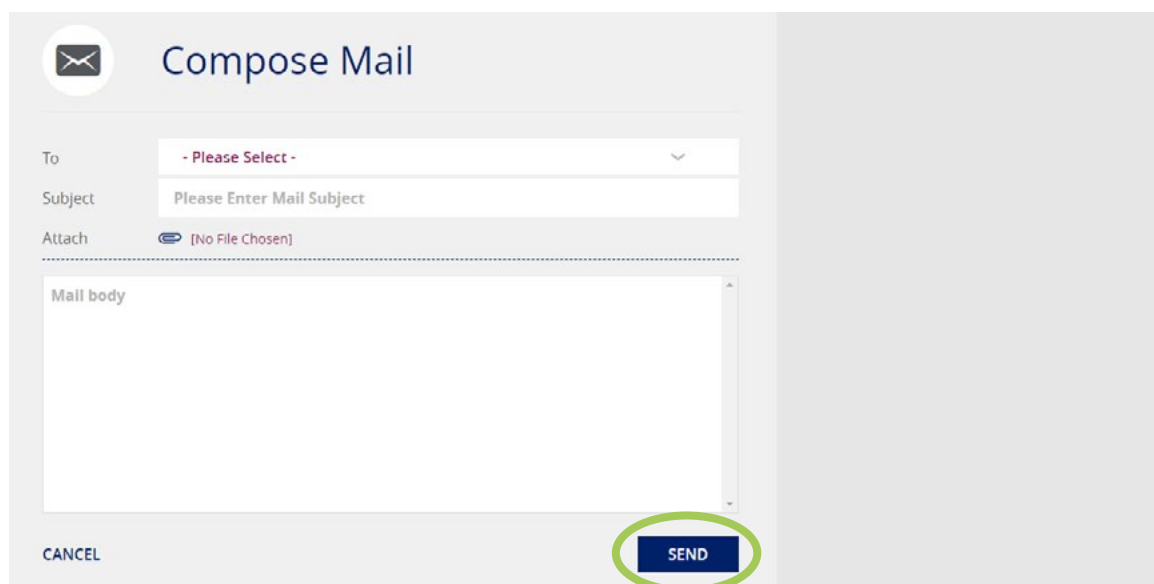
This can be accessed under **Services**.



Select **Compose** to type your message and add attachments (if required).

Once complete click **Send**.

Any new correspondence sent to you by AIDF using secure mail, will be display in your notifications panel on your welcome page and under **Notifications**.



Please note that secure SMS validation will need to be set up in order to access and use the secure mail service. If this is not already done, you will be prompted to do so.



Session History

You can check all of your session history and changes made.

The screenshot shows the 'Session History' page. At the top, there is a user profile bar for 'Testing Data Action' with a 'Logout' link. Below this is a navigation bar with icons for Accounts, Transfer/Pay, Services, Settings, and Help. The main content area has a header with a person icon and the title 'Session History'. Below the header is a filter section with 'Date Range' set to '13/07/2022' to '28/07/2022' and a 'Group' dropdown menu. A 'SEARCH' button is located to the right of the filter section. The main content area displays a list of session events:

	UPDATE ADDRESS DETAILS 28 JUL 2022 1:33PM
	SECURE SMS SENT 28 JUL 2022 1:29PM
	LOGON 28 JUL 2022 1:25PM



Notifications

You can now elect to receive receipts and notifications via email.

The screenshot shows the 'Notifications' page. At the top, there is a user profile bar for 'Testing Data Action' with a 'Logout' link. Below this is a navigation bar with icons for Accounts, Transfer/Pay, Services, Settings, and Help. The main content area has a header with an exclamation mark icon and the title 'Notifications'. Below the header is a text block: 'We will send receipts and notifications to the following email address. Please use the options below to choose which you would like to receive.' Below this is a form with an 'Email' field containing 'helpdesk@da.com.au'. A note below the email field states: 'Please note: This email address has been extracted from our system but not currently being used for this option.' Below the note is a list of checkboxes for notification types:

- Internal Transfer
- Institution Transfer
- External Transfer
- BPay Payments
- Business Banking
- Non Transactional Email

A 'SAVE' button is located at the bottom right of the page.

SERVICES MENU



Address Details



Contact Details



Change Password



Settings



Secure SMS Management



Address Details

Update your mailing and residential address.

Address Details

MAILING ADDRESS
Data Action GPO BOX Level 3 55 Currie Street ADELAIDE 5000 SA

Care Of Details	
Property	Data Action
PO Box/Flat Type	GPO BOX
PO Box/Flat Number	Level 3
Street Number	55
Street Name	Currie
Street Type	Street
State	SA
Post Code	5000
Suburb	ADELAIDE

SAVE

RESIDENTIAL
Data Action Level 3 55 Currie Street ADELAIDE 5000 SA



Contact Details

Update your phone numbers and/or email address.

Contact Details

PHONE NUMBERS

Home	02 6247 3744
Business	
Mobile	
Fax	

EMAIL ADDRESSES

Home	helpdesk@da.com.au
Business	aidf@aidf.com.au

SAVE

Please note that secure SMS validation will need to be set up in order to update and edit any contact details (including address). If this is not already done, you will be prompted to do so.



Change Password

Update and change your existing password. Password requirements are listed on the webpage.

Testing Data Action · You last logged in 28/07/2022 01:24PM Logout

A+DF Accounts Transfer/Pay Services Settings Help

Change Password

To change your password, please enter your current password, then enter your new password and confirm it. Click the Change Password button when you are done.

Your new password (examples may not be configured as such):

- Must be between 8 and 16 characters long
- Must contain both letters and numbers
- Must be different to your previous 5 passwords
- Should not contain part of your name or your date of birth
- Must not contain your member number

Current Password

New Password

Confirm New Password

CHANGE PASSWORD



Settings

Choose your preferred account.

Settings

PREFERRED ACCOUNT

DATA ACTION TESTING \$8.41

ACCOUNT 05209792 CURRENT \$8.41

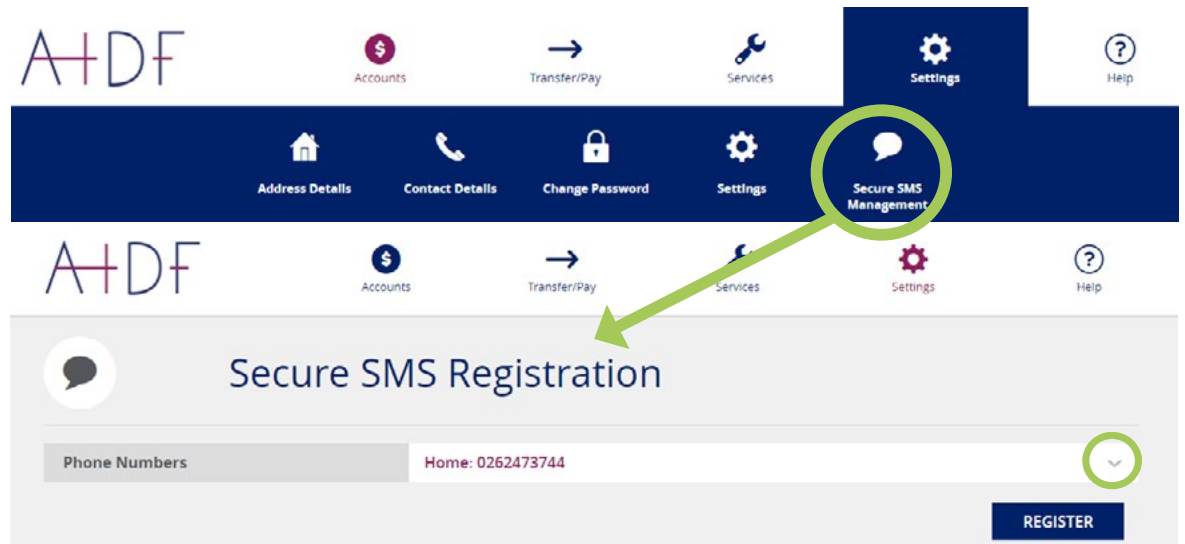
SAVE



Secure SMS Validation

For security, you may be required to set up secure SMS validation.

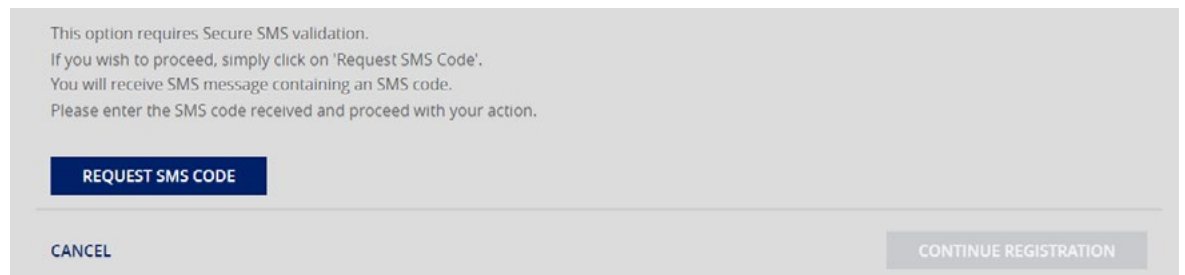
Under the **Settings** menu, you will find the **Secure SMS Management** sub-menu.



Select your phone number from the drop down list.

If your preferred phone number is not listed and you have checked the drop down menu, please contact us on (02) 6247 3744 or email us at aidf@aidf.com.au to load your preferred phone number into the system.

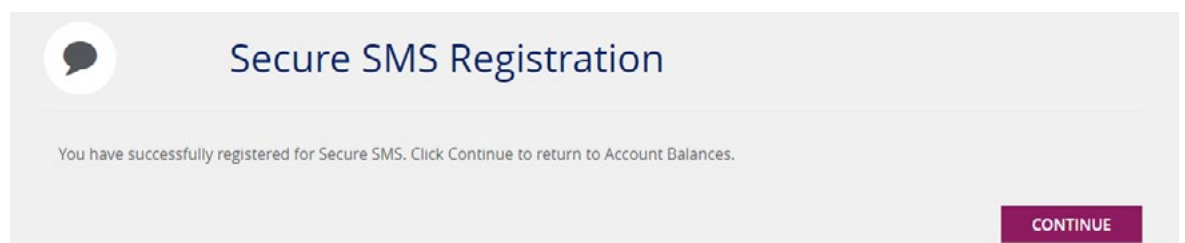
After you have selected your preferred phone number, select **Register** and then **Request SMS Code**.



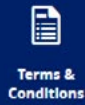
Depending on whether you have registered a mobile or landline, you will receive a code via your requested phone number. If you selected a landline, you will receive an automated voice message, or if you selected a mobile number, you will received a code via text message.

Once received, enter the code into the field and select **Continue Registration** then **Continue**.

You are now registered for Secure SMS.



HELP MENU



Terms & Conditions

Read AIDF Terms & Conditions.



Terms & Conditions

ONLINE TRANSACTION SERVICES TERMS AND CONDITIONS

By using this service, I agree to have read and accept the following Terms and Conditions



User Guides

Access Online Transaction Services User Guides, for both personal and business.

Online Transaction Services User Guides

- [Personal User Guide](#)
- [Business User Guide](#)

All the above documents are located under **Forms** on the AIDF website, as seen below.



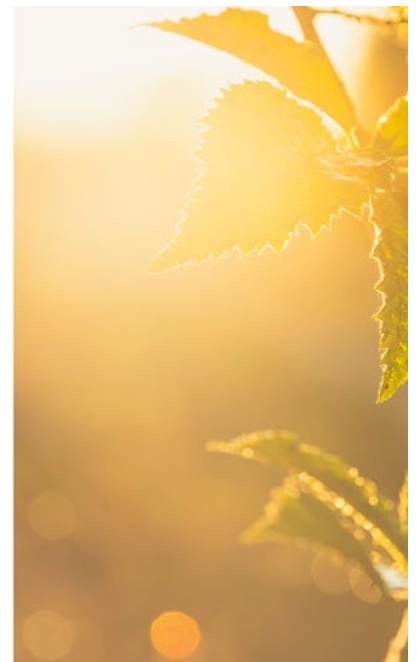
Other Documents

ONLINE USER GUIDES

- [Personal Accounts](#)
- [Business Accounts](#)

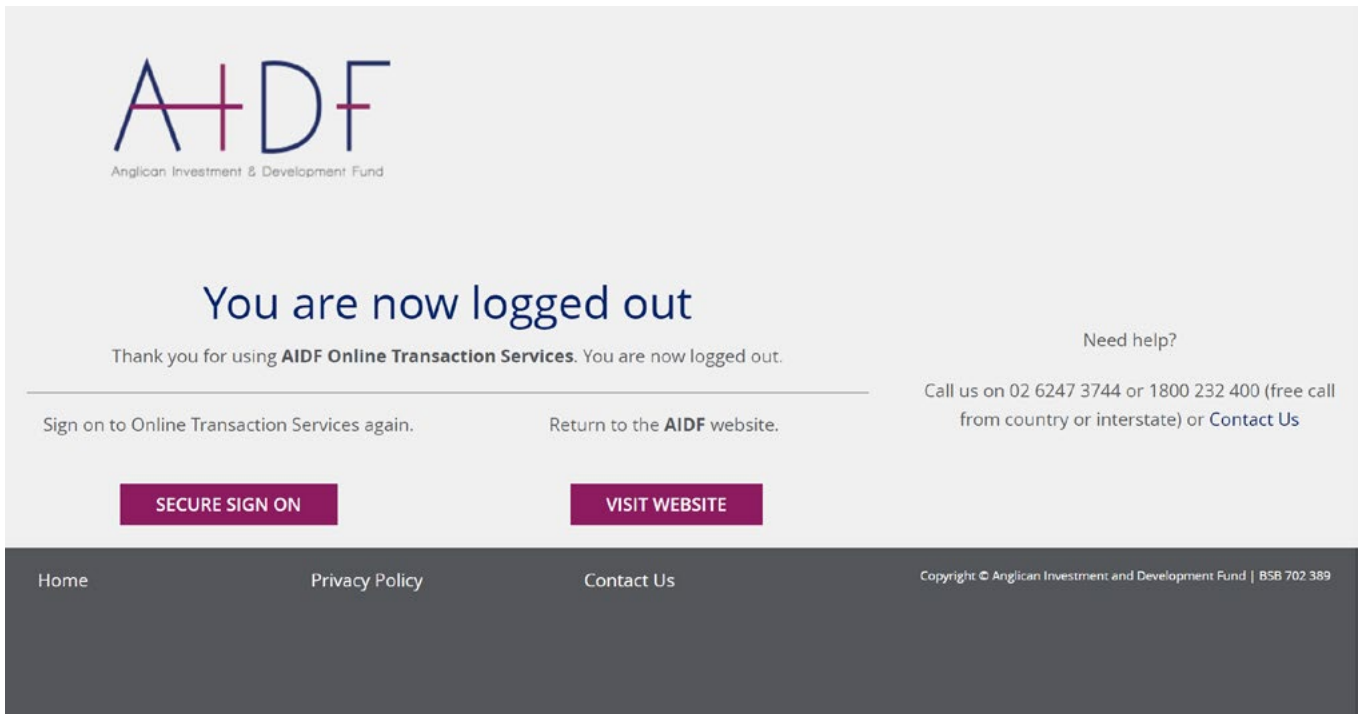
TERMS & CONDITIONS

- [Online Transactions](#)
- [BPAY](#)



LOGOUT

Ensure you always **Logout** at the end of your session.



The screenshot shows the AIDF Online Transaction Services Logout page. At the top left is the AIDF logo (Anglican Investment & Development Fund). The main heading is "You are now logged out". Below this, a message says "Thank you for using AIDF Online Transaction Services. You are now logged out." To the right, there is a "Need help?" section with contact information: "Call us on 02 6247 3744 or 1800 232 400 (free call from country or interstate) or Contact Us". Below the main message, there are two options: "Sign on to Online Transaction Services again." with a "SECURE SIGN ON" button, and "Return to the AIDF website." with a "VISIT WEBSITE" button. The footer contains links for "Home", "Privacy Policy", and "Contact Us", along with the copyright notice: "Copyright © Anglican Investment and Development Fund | BSB 702 389".

If you have any questions in relation to the new theme of our Online Transaction Services, or any other enquiries or questions, please don't hesitate to contact us:

Phone: (02) 6247 3744

Frecall Phone: 1800 232 400

Email: aidf@aidf.com.au

Address: Level 3 221 London Circuit, Canberra ACT 2601

Postal Address: GPO BOX 1243 Canberra ACT 2601

