Anglican Investment & Development Fund

ONLINE USER GUIDE

FOR ONLINE TRANSACTION SERVICES

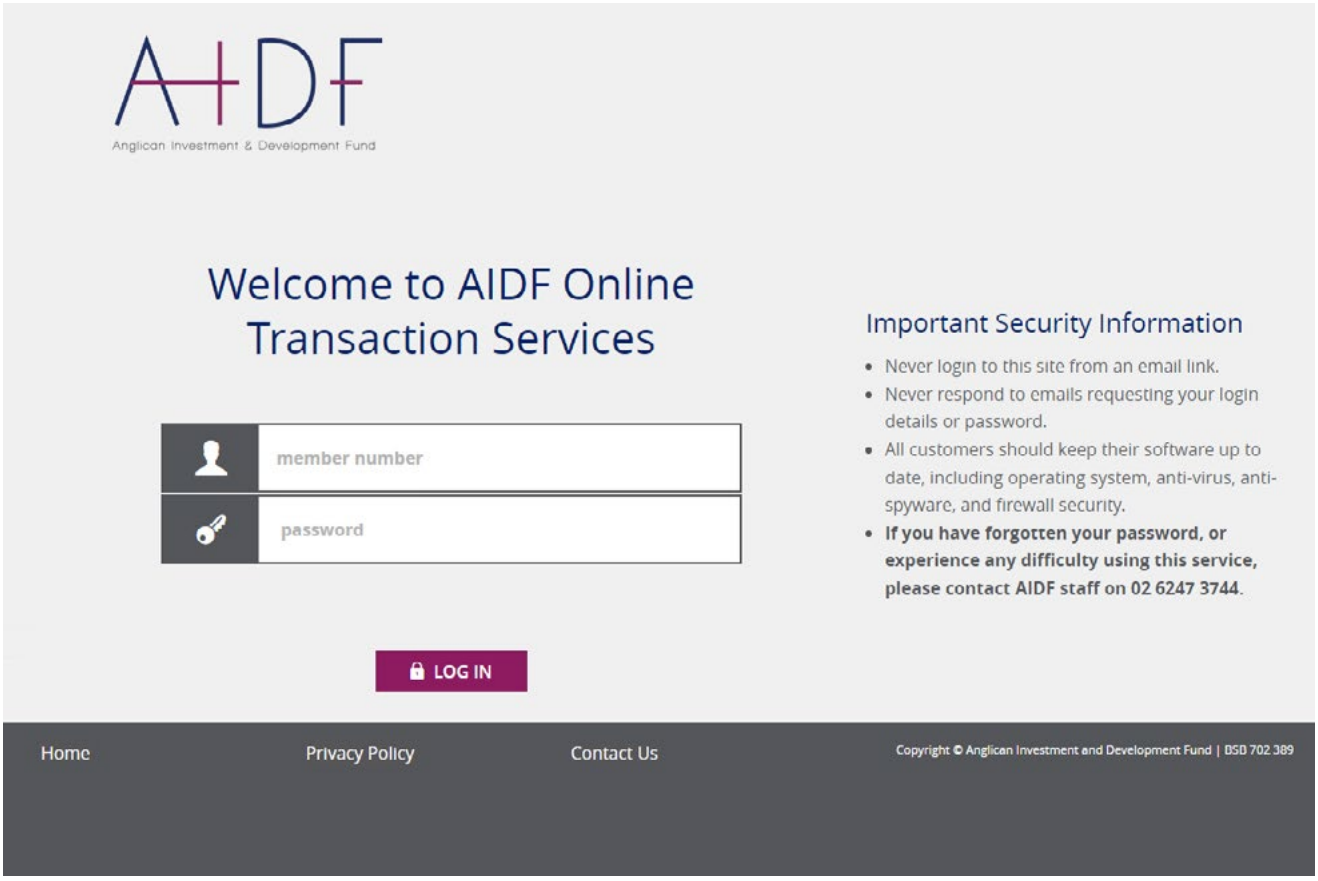
CONTENTS

LOGIN 4
Setting up your Password 4
HOME 4
Setting up your Password 5
MENU OPTIONS 6
Accounts Menu 6
Transfer/Pay Menu 6
Services Menu 7
Settings Menu 7
Help Menu 7
ACCOUNTS MENU 8
Balances 8
History 8
Direct Credits 9
Interest Details 9
Account Reorder 9
TRANSFER/PAY MENU 10
Transfer 10
Pay Member 10
Pay Anyone 11
BPay 11
Scheduled Transfers 11
Bulk Transfer 12
Manual Batch 13
SERVICES MENU 16
Secure Mail 16
Session History 17
Notifications 17
SERVICES MENU 18
Address Details 18
Contact Details 18
Change Password 19
Settings 19
Secure SMS Validation 20
HELP MENU 21
Terms & Conditions 21
User Guides 21
LOGOUT 22

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.



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.

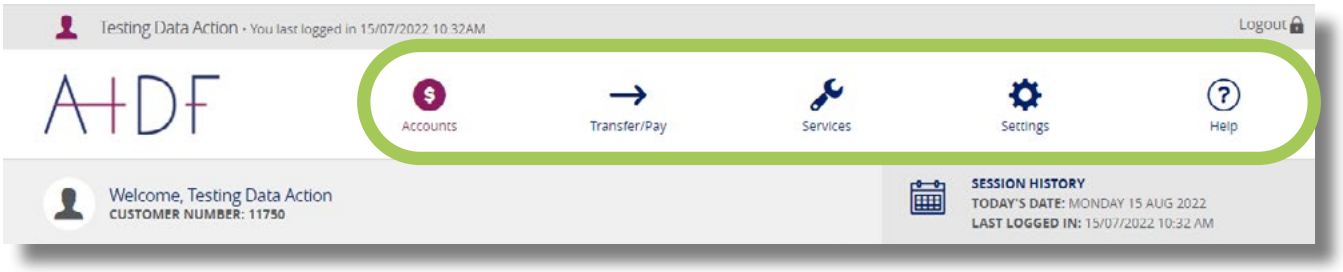
To maintain security, your chosen password must comply with below:

- 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

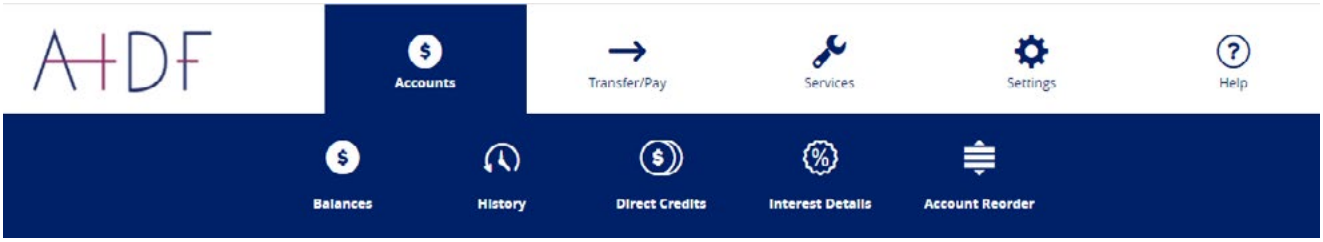
When you have selected a password that is suitable, click ***Change Password*** followed by ***Continue***.

MENU OPTIONS

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



Accounts Menu

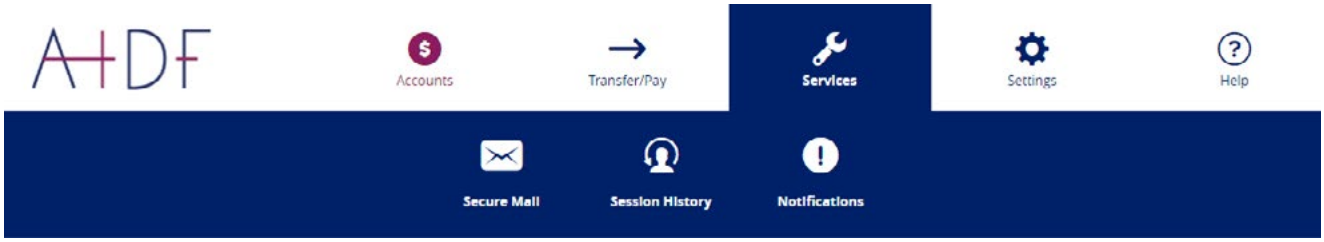


Balances	View your current account balances.
History	Transaction history of accounts.
Direct Credits	Direct Credits received.
Interest Details	Interest received on each account.
Account Reorder	Change the order of your accounts displayed on your accounts page.

Transfer/Pay Menu

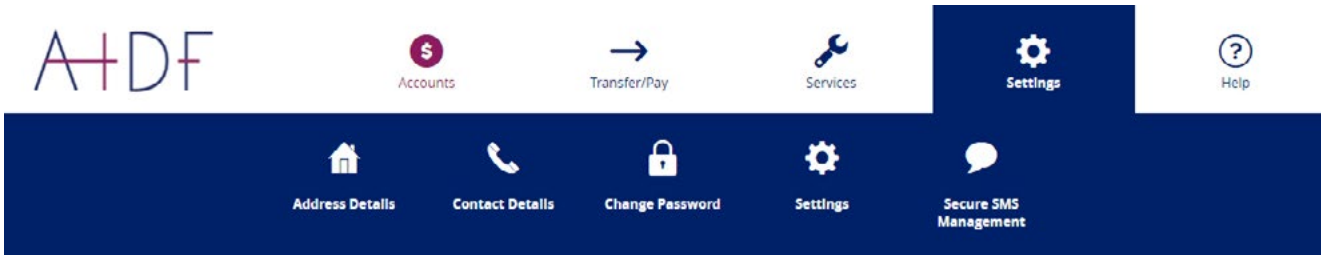
Transfer	Between your own accounts.
Pay Member	Transfer money to another account held with the AIDF.
Pay Anyone	Transfer money to accounts held at other finanicial institutions.
BPay	Pay a bill using BPay.
Scheduled Transfers	View your current scheduled transfers.
Bulk Transfer	Bulk transfers MUST be 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.

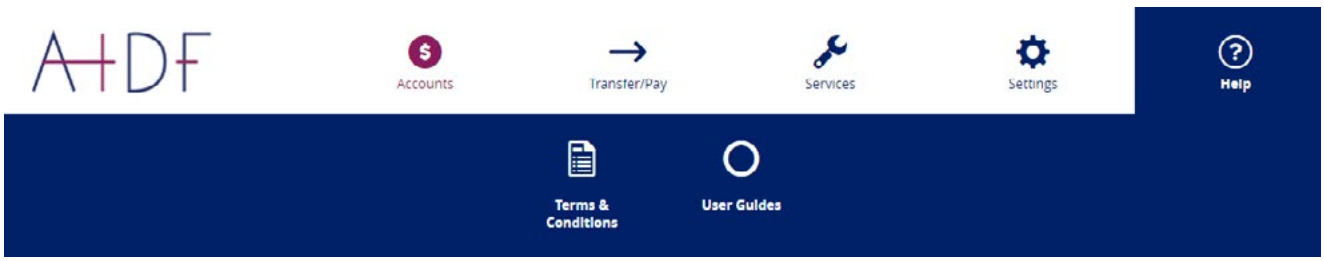
Settings Menu



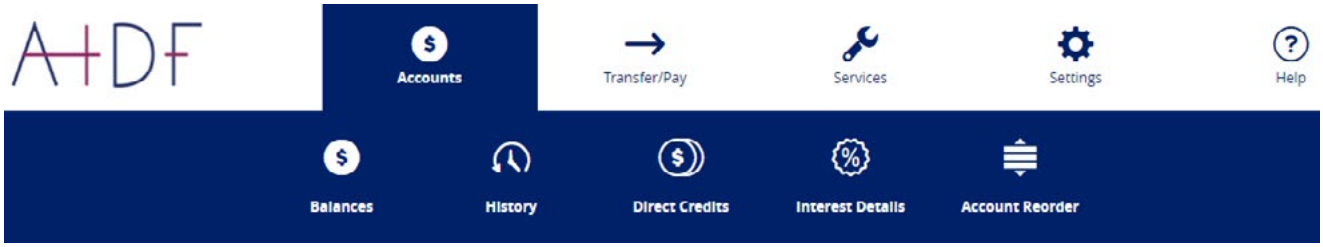
Address Details	Update your address details.
Contact Details	Update your contact details.
Change Password	Change your password.
Settings	Choose your preferred account.
Secure SMS Management	Set up Secure SMS Management (see page X).

Help Menu

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

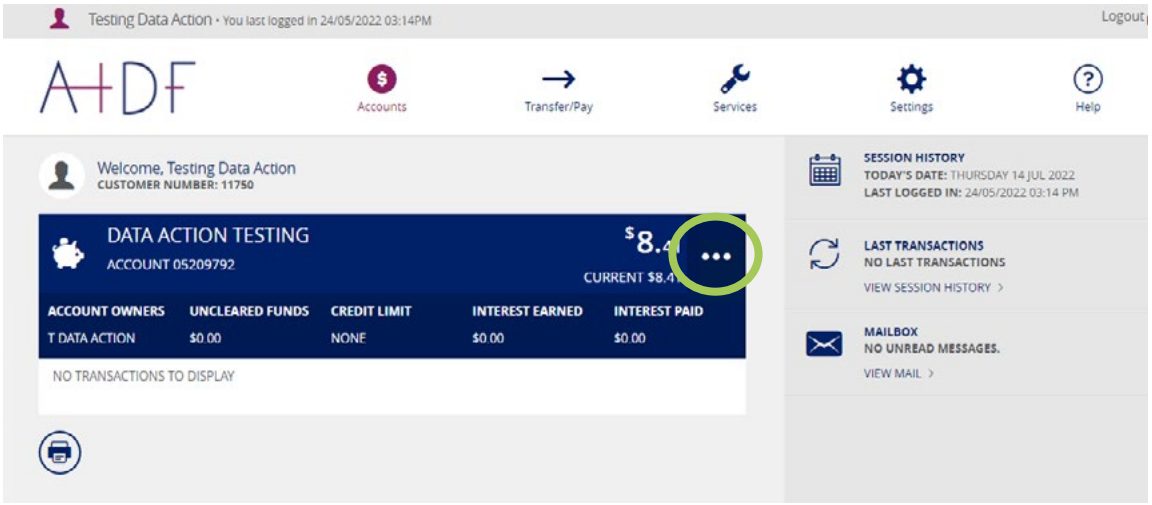


ACCOUNTS MENU



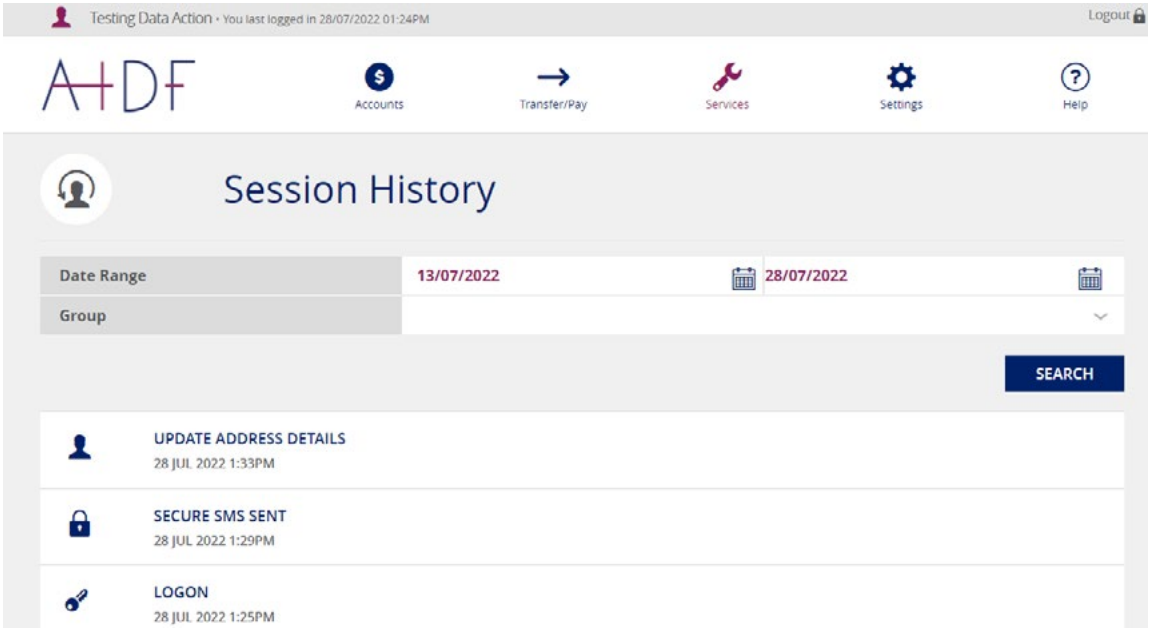
Balances

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



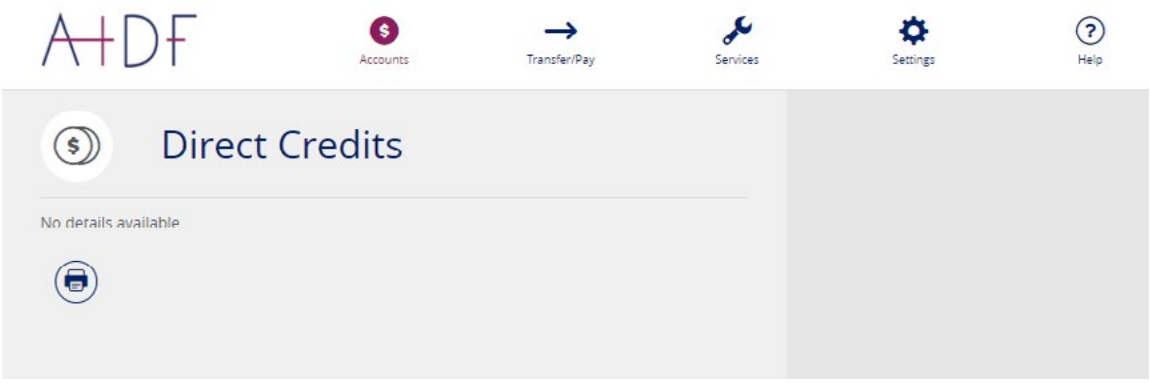
History

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



Direct Credits

View your accounts direct credits.

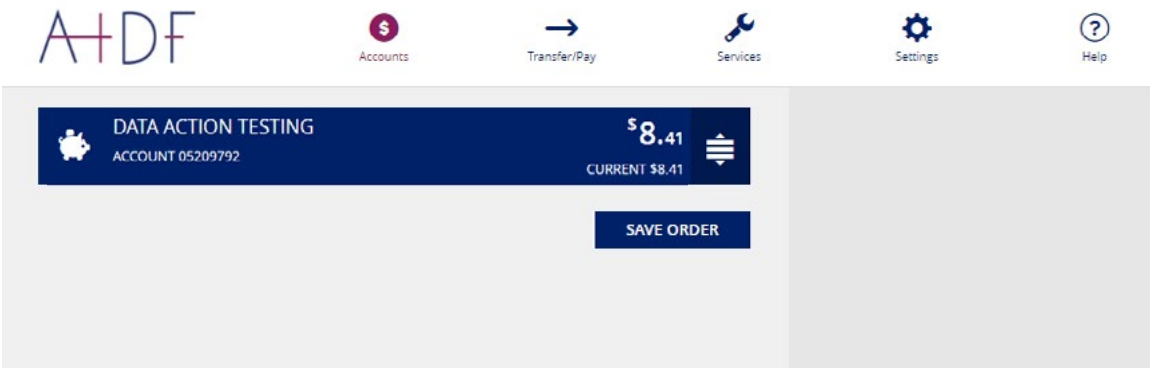


Interest Details

View your interest details for each account held with AIDF.

Account Reorder

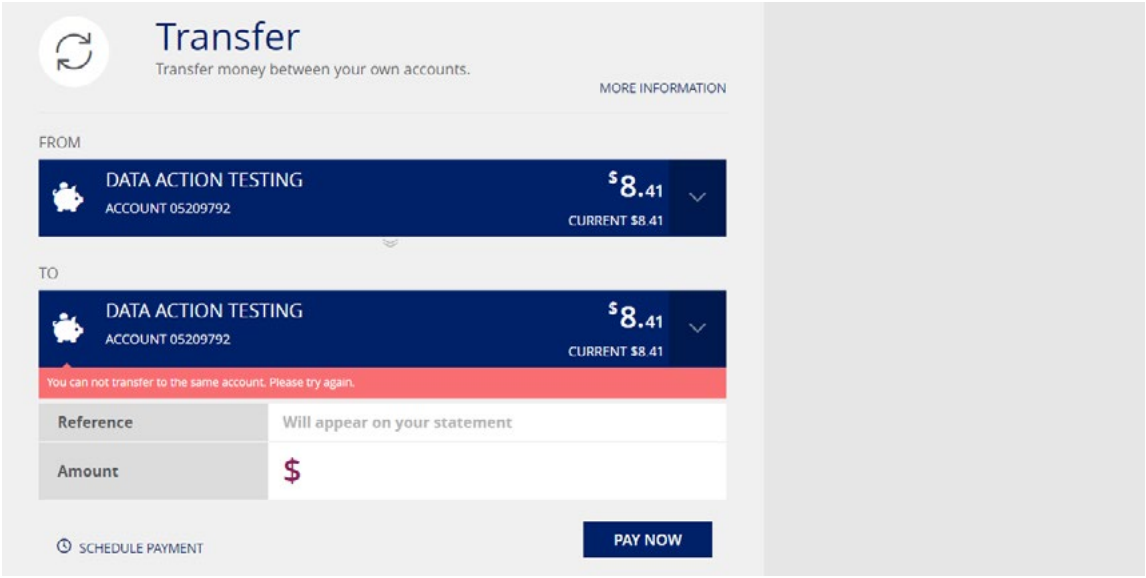
Reorganise your account display order.



TRANSFER/PAY MENU

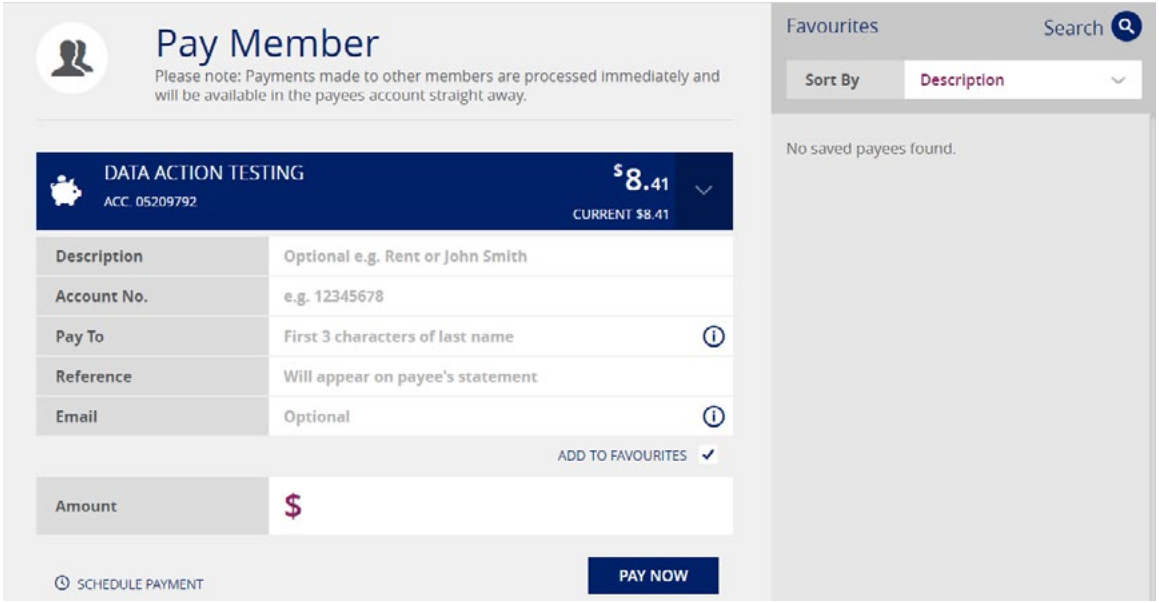
Transfer

Transfer money between your **own accounts**.



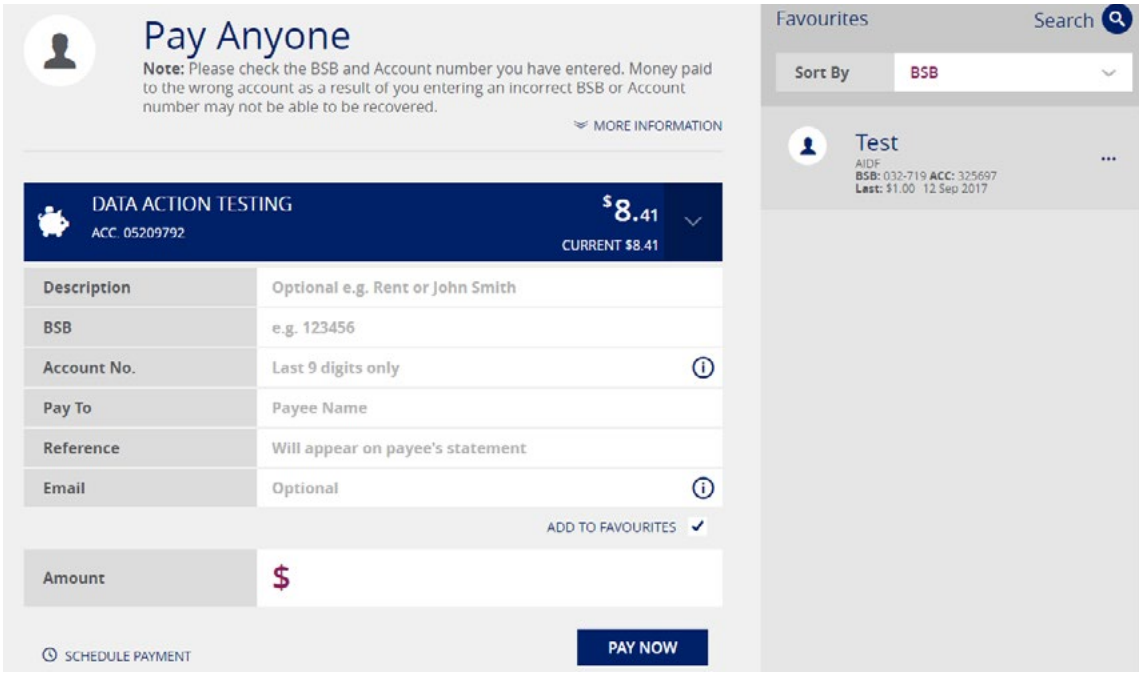
Pay Member

Transfer money to **another AIDF account**.



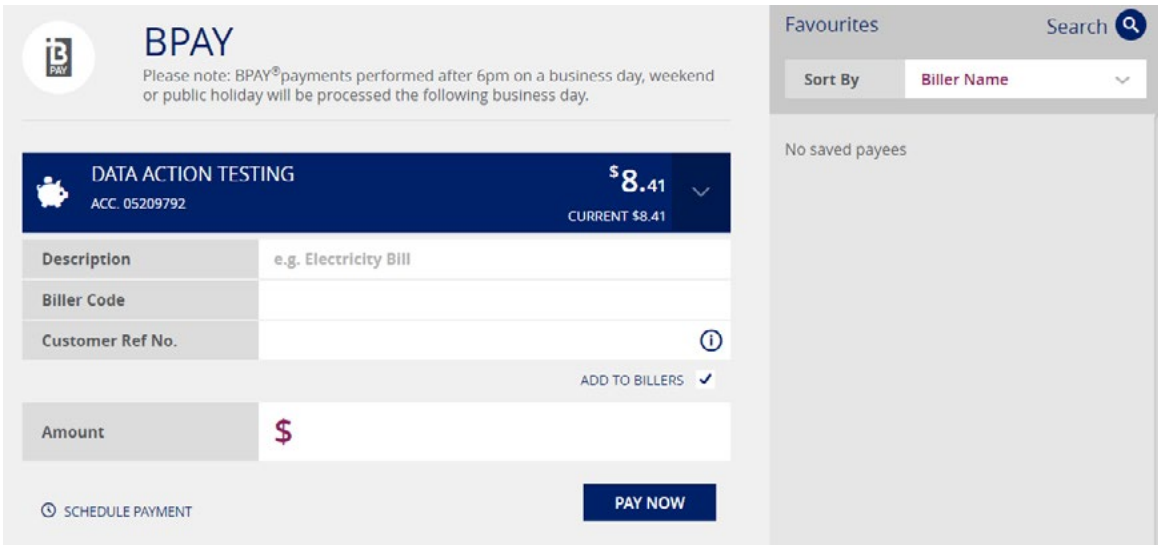
Pay Anyone

Transfer money to **another bank institution**.



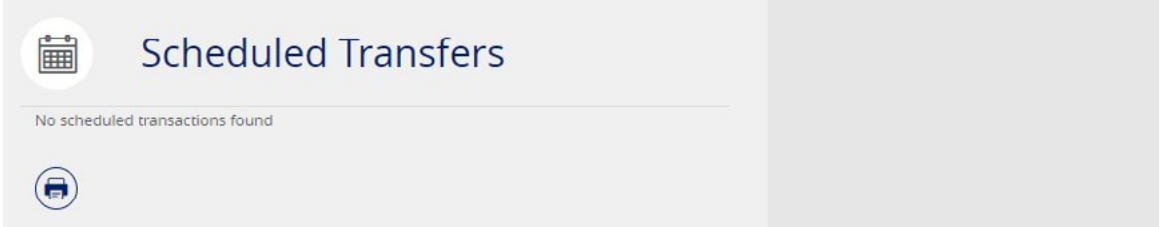
BPay

Pay a bill using **BPay**.



Scheduled Transfers

View all scheduled transfers pending.

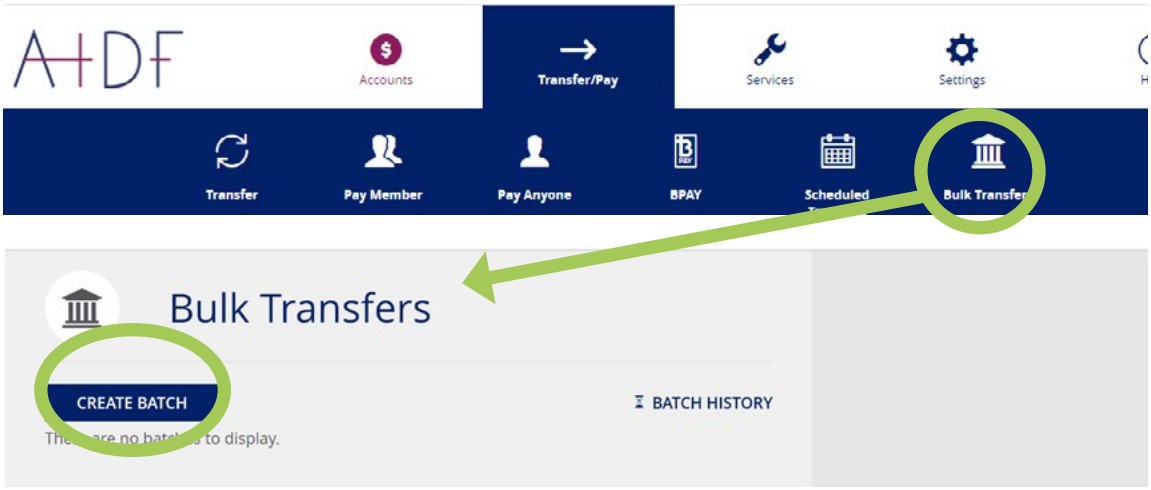


Bulk Transfer

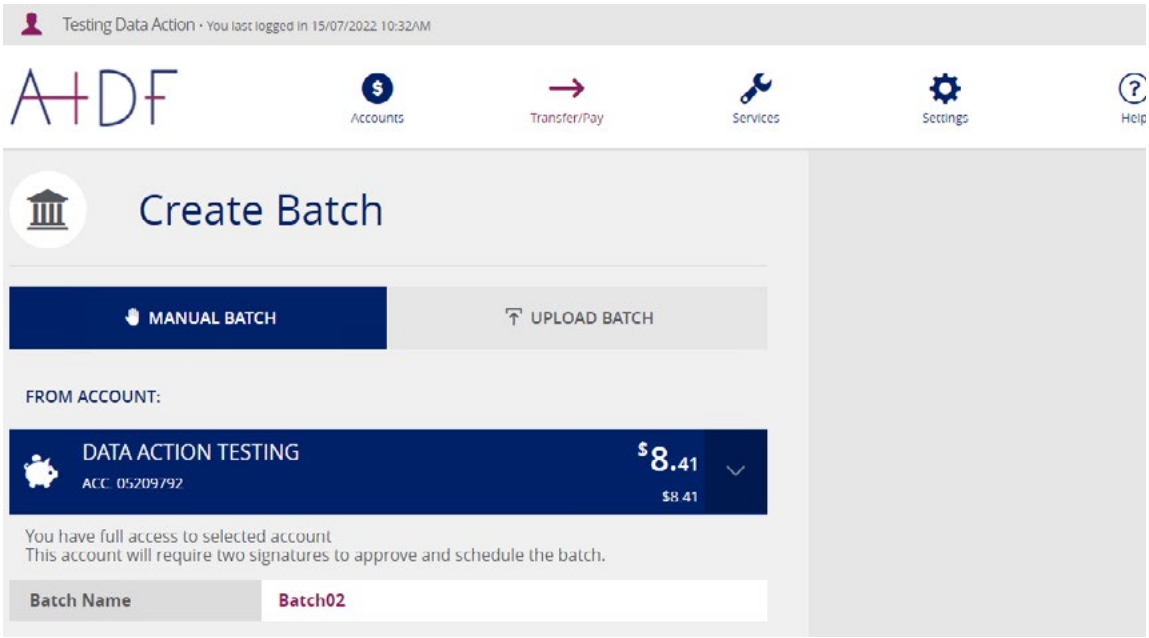
For accounts that hold two (2) signatories, you MUST use the **Bulk Transfers** option under the **Transfer/Pay** tab only.

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.**

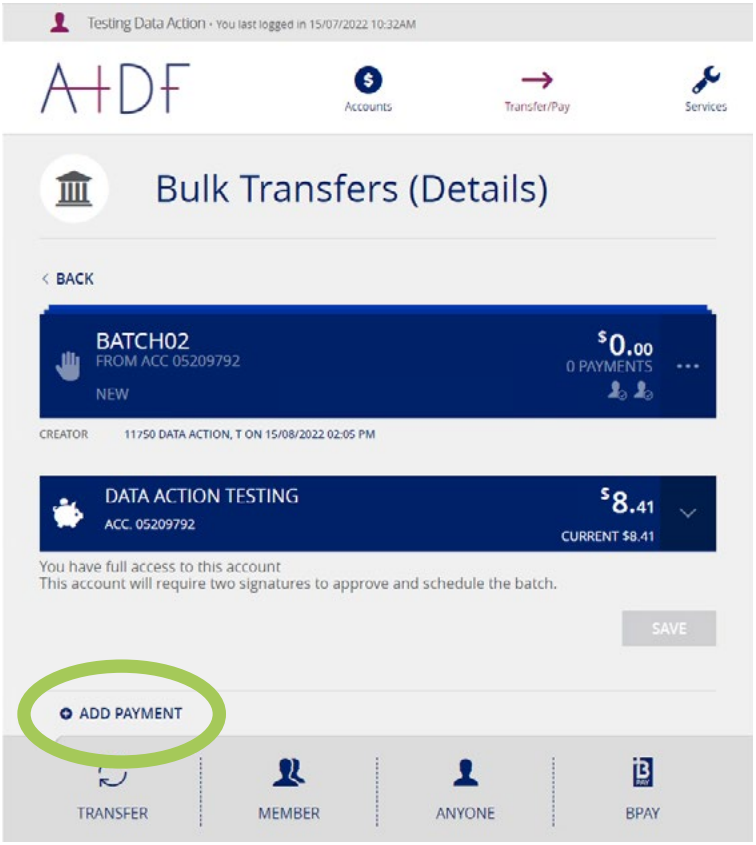


The next webpage (as shown below) will allow you to either **Upload a Batch** for payroll/ multiple payments, or create a **Manual Batch** by adding each payment in.



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.



Transfer

Between your own accounts.

Pay Member

Transfer money to another account held with the AIDF.

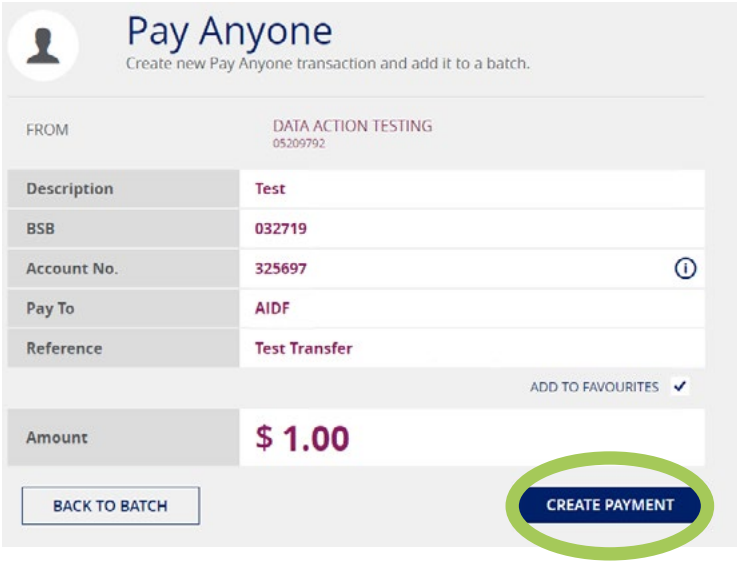
Pay Anyone

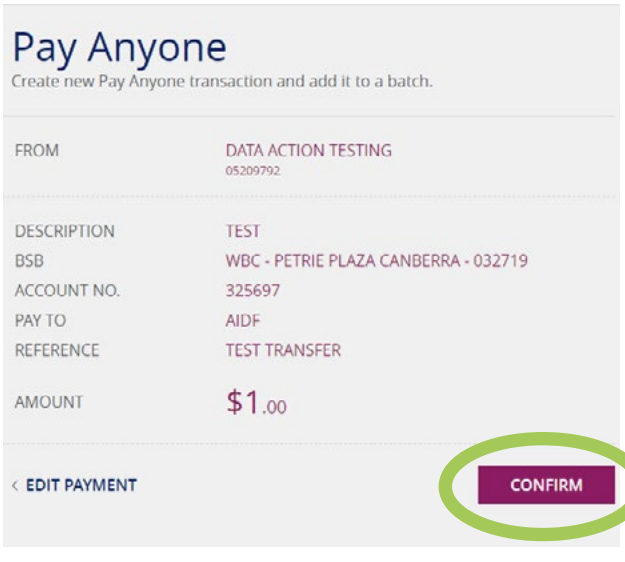
Transfer money to accounts held at other finanicial institutions.

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.**





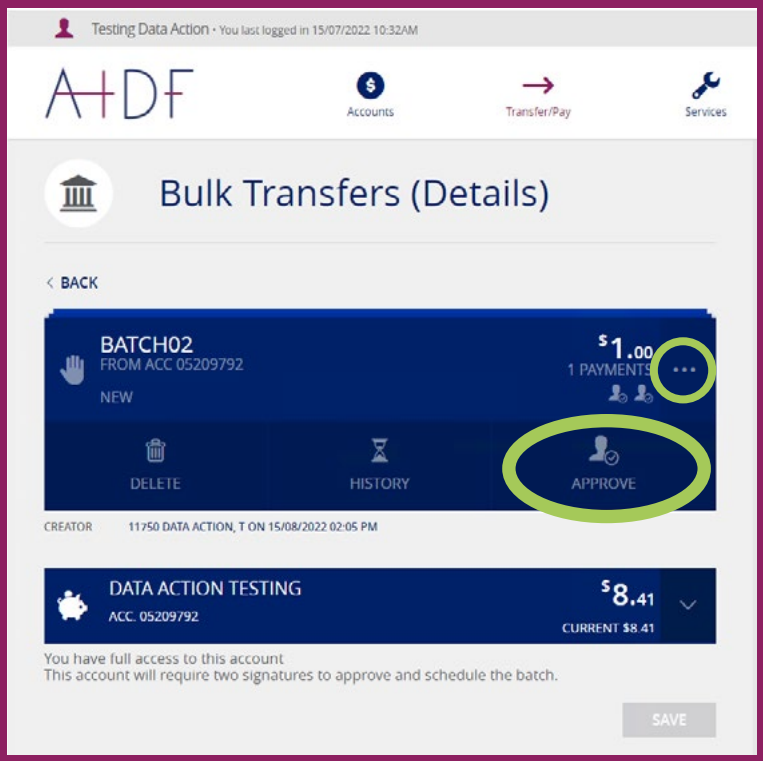
Return to your batch, repeat this process to add more payments, if required.

NOTE

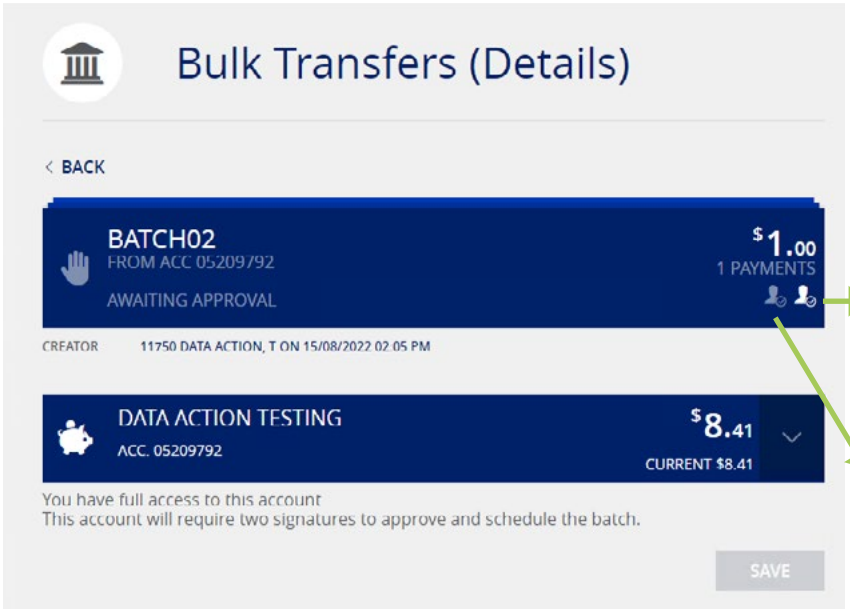
YOU NEED TO APPROVE THE BATCH AFTER YOU CREATE IT!

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.

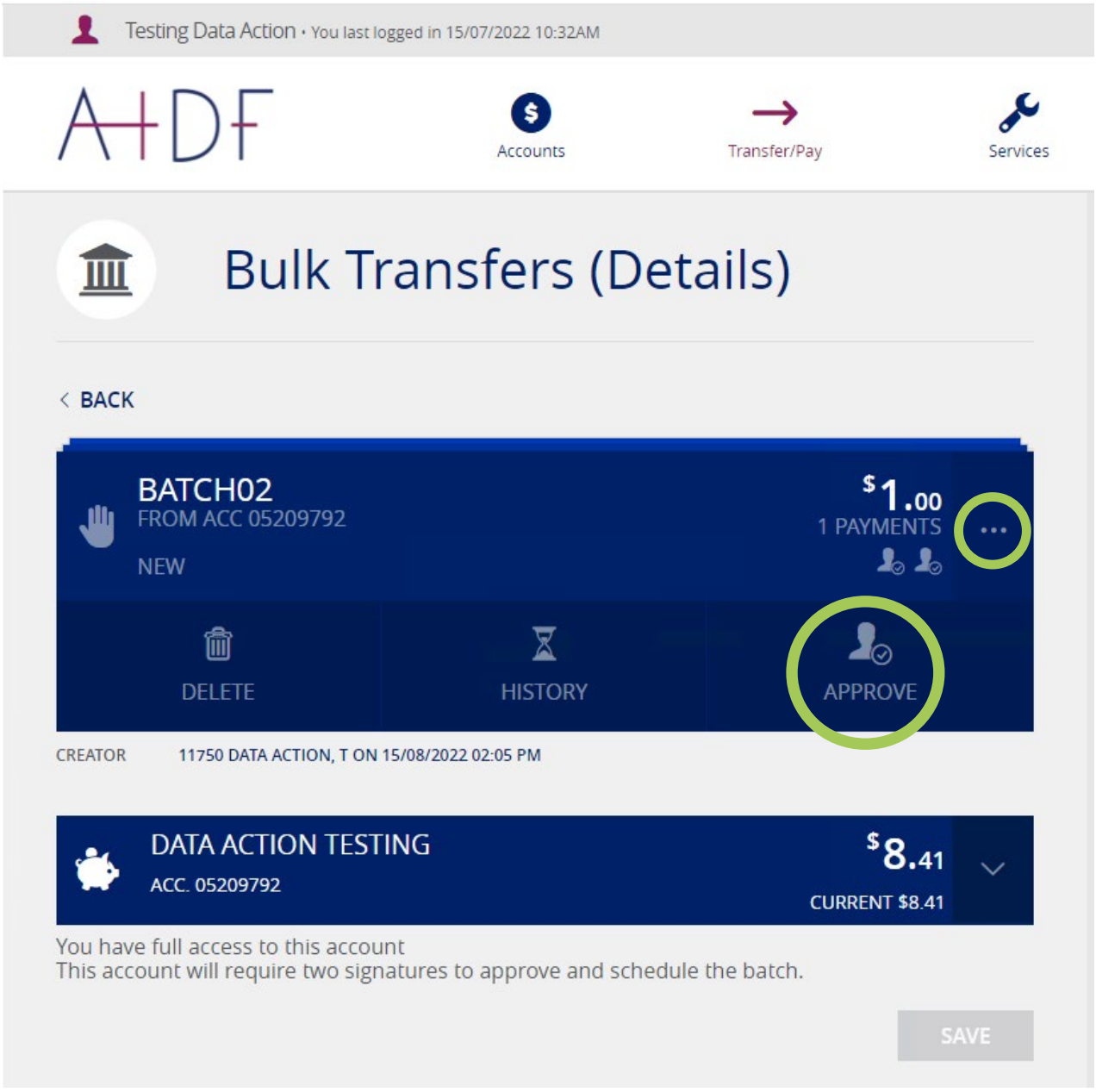
Awaiting a second signatory to authorise the batch.

SECOND SIGNATORY APPROVAL

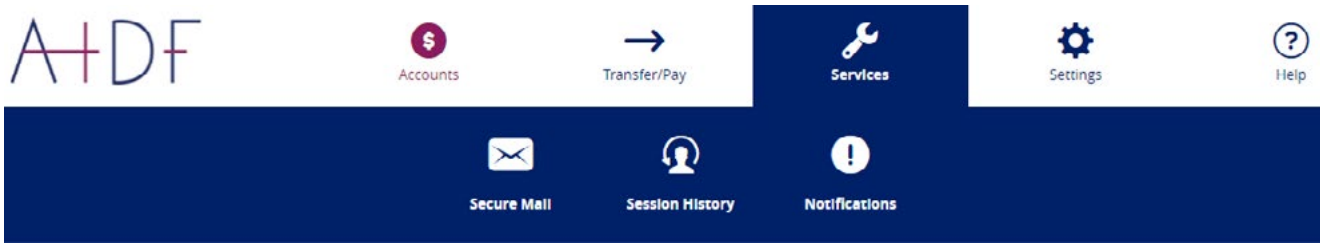
A second signatory will be notified when they login to their AIDF account of a batch awaiting approval. The three dots display several options to view/edit, cancel and view history log.

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**.



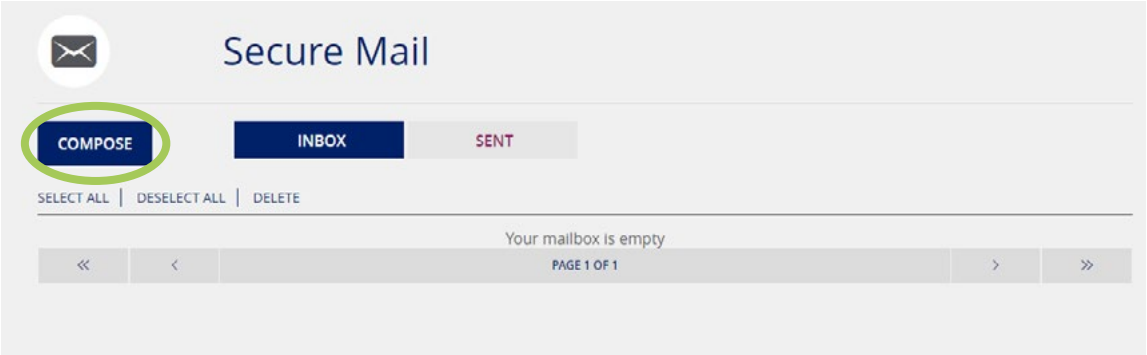
SERVICES MENU



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.

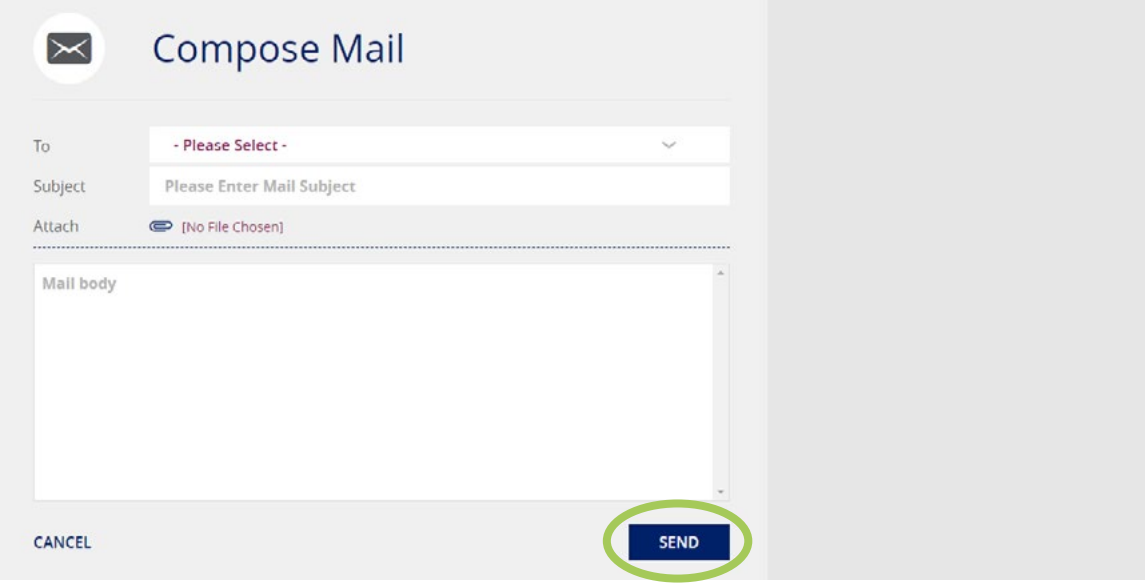
This can be accessed under **Services**.



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

Once complete click **Send**.

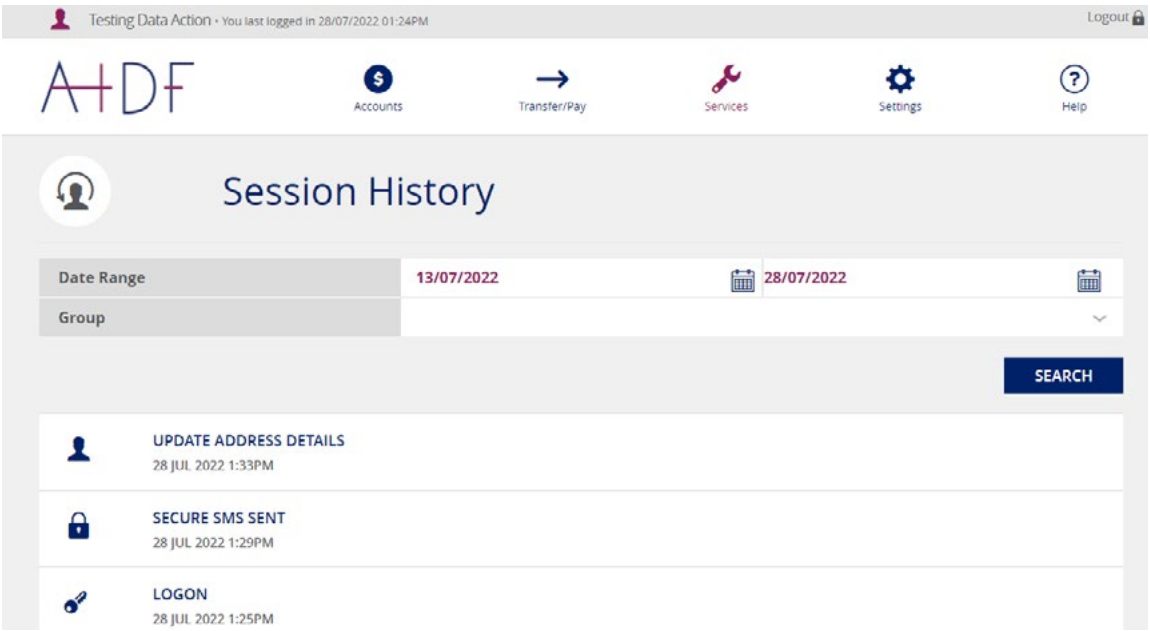
Any new correspondence sent to you by AIDF using secure mail, will be display in your notifications panel on your welcome page and under **Notifications**.



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.

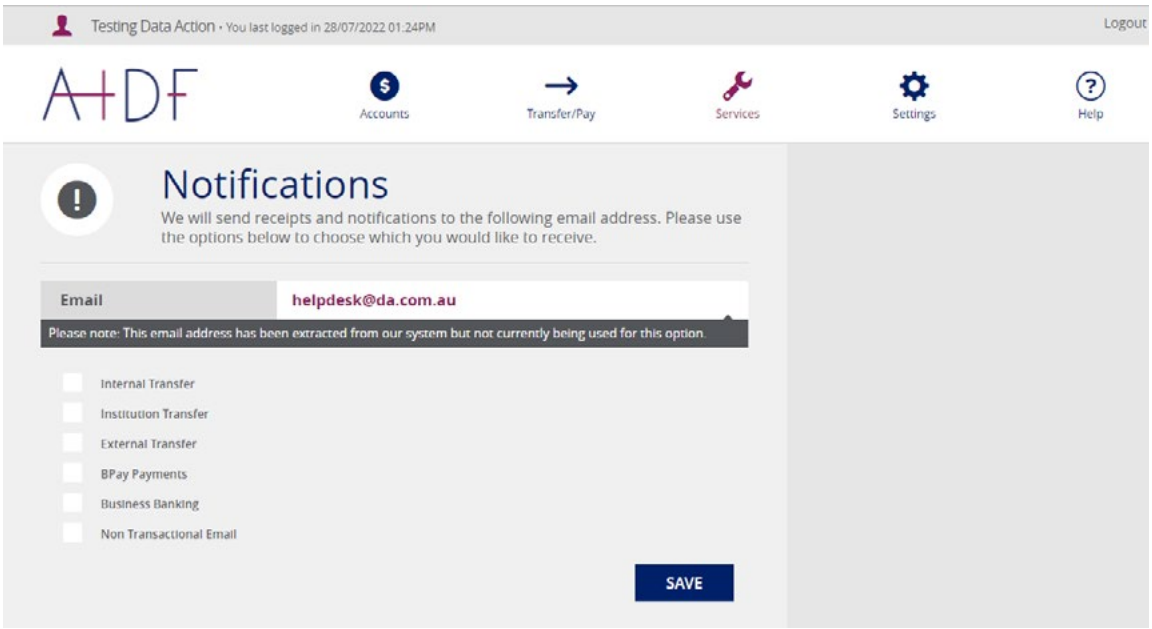
Session History

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

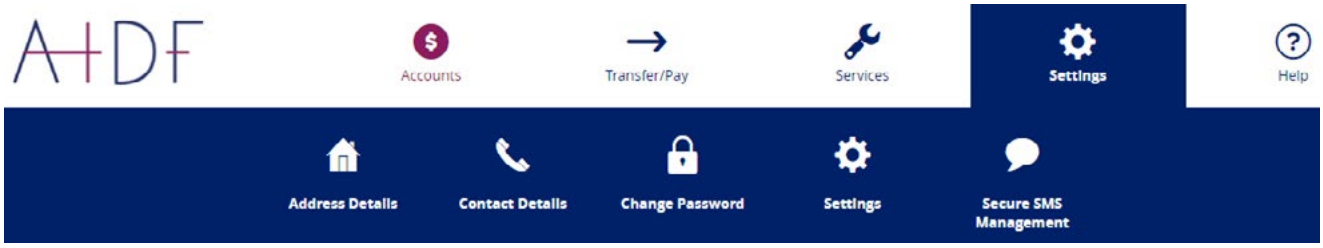


Notifications

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

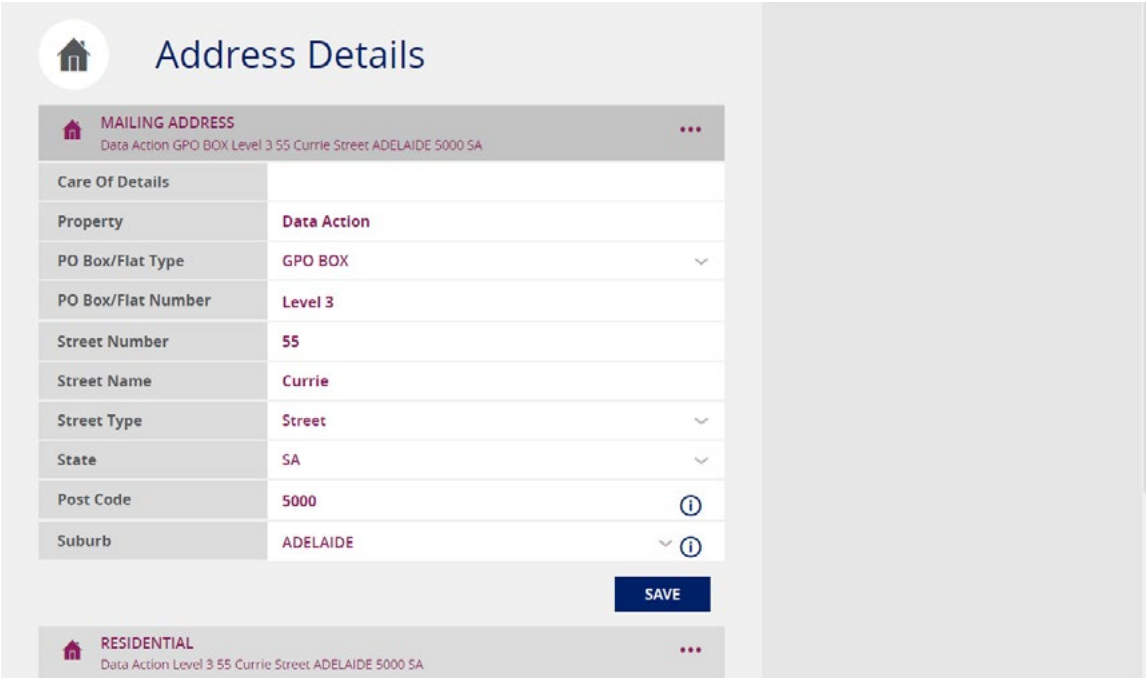


SERVICES MENU



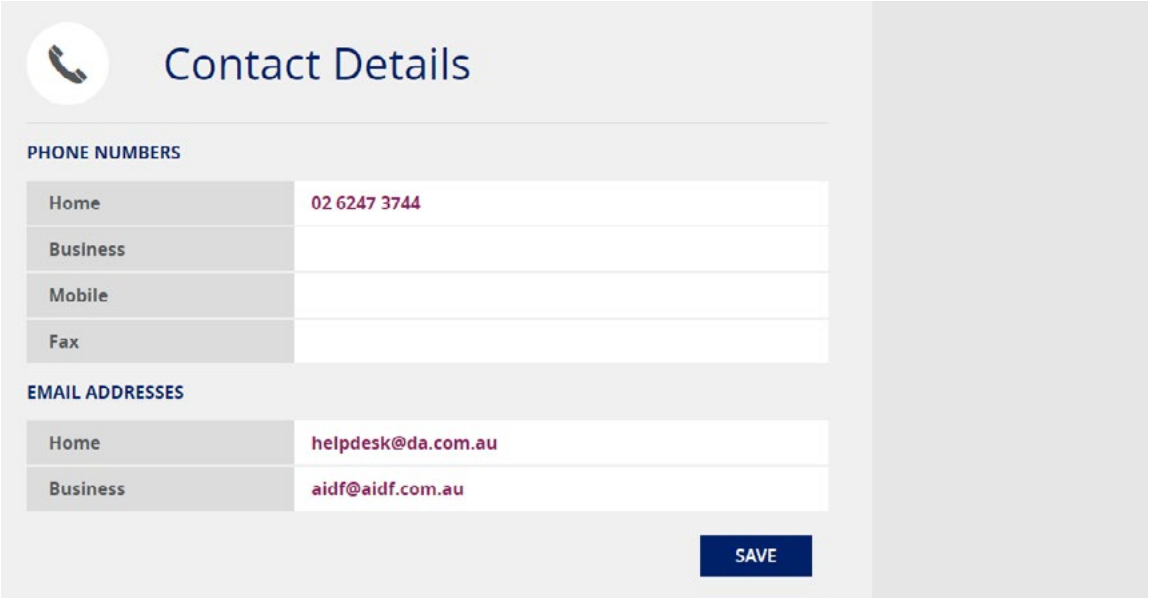
Address Details

Update your mailing and residential address.



Contact Details

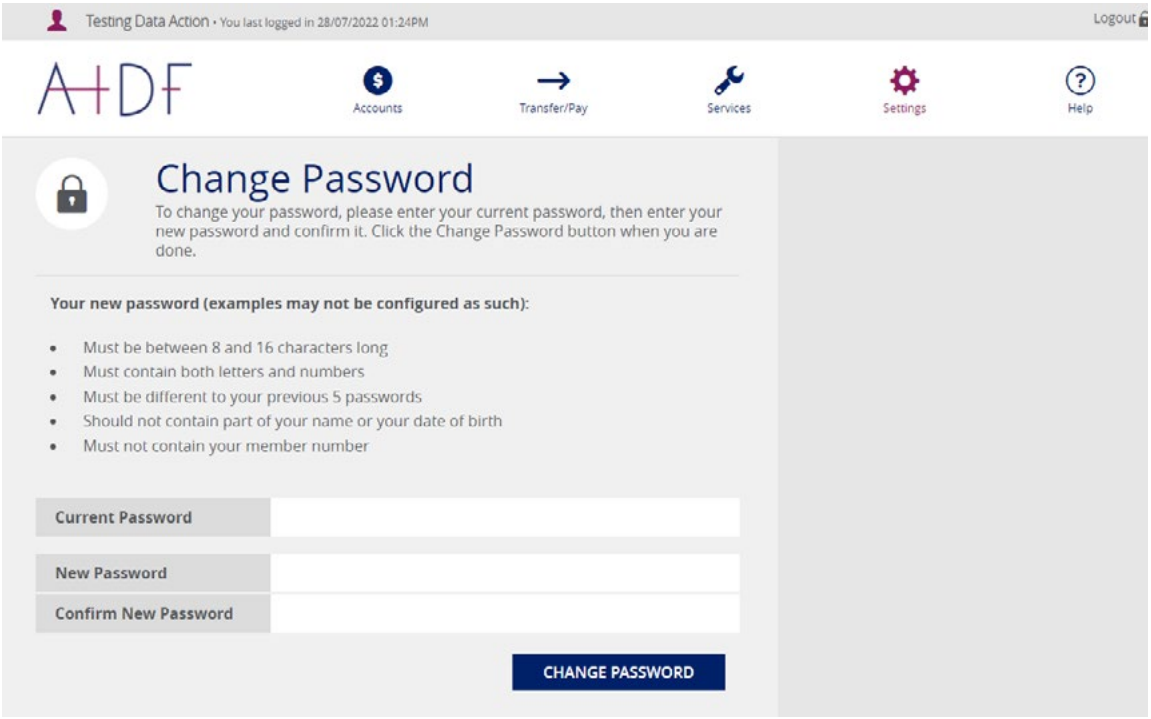
Update your phone numbers and/or email address.



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.

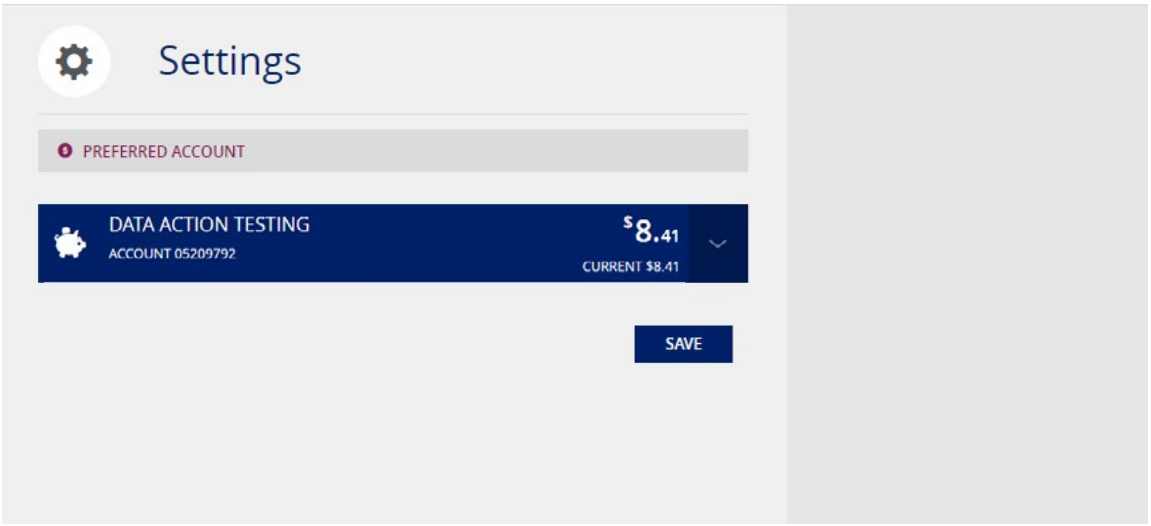
Change Password

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



Settings

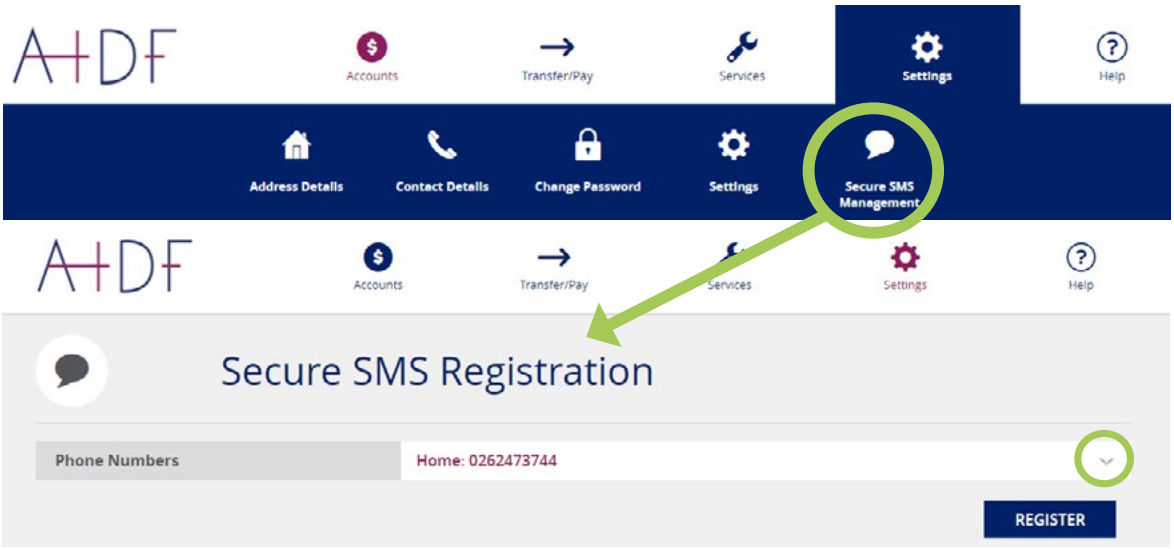
Choose your preferred account.



Secure SMS Validation

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

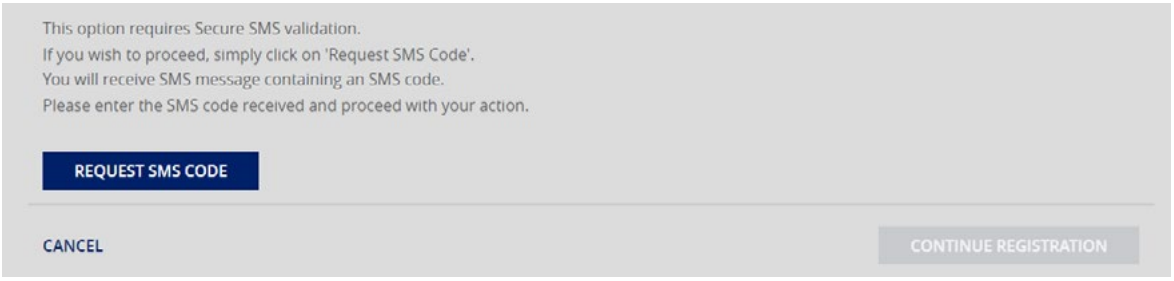
Under the **Settings** menu, you will find the **Secure SMS Management** sub-menu.



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.

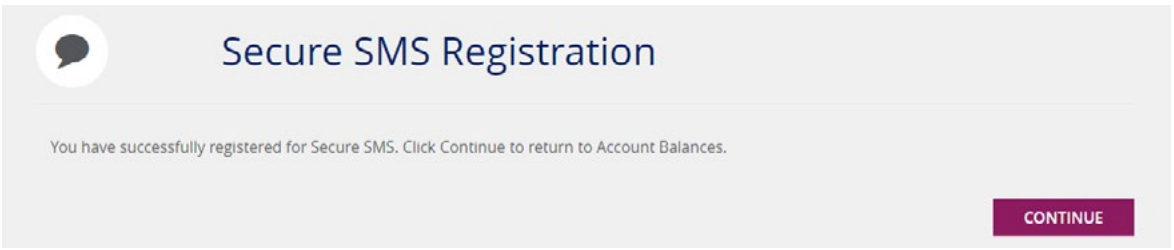
After you have selected your preferred phone number, select **Register** and then **Request SMS Code.**



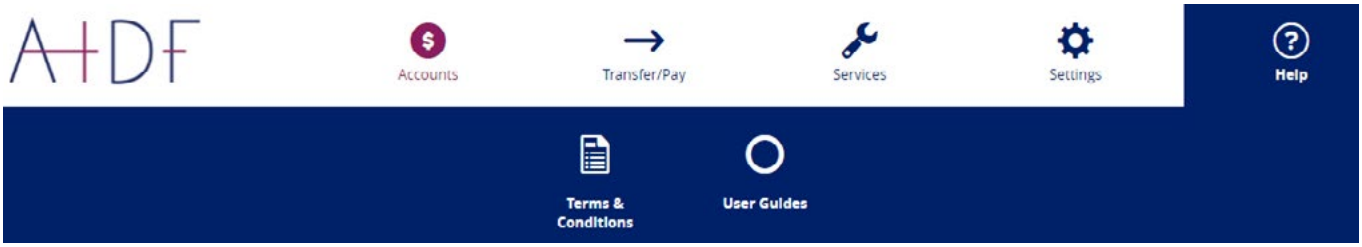
Depending on whether you have registered a mobile or landline, you will receive a code via your requested phone number. If you selected a landline, you will receive an automated voice message, or if you selected a mobile number, you will recevied a code via text message.

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

You are now registered for Secure SMS.



HELP MENU



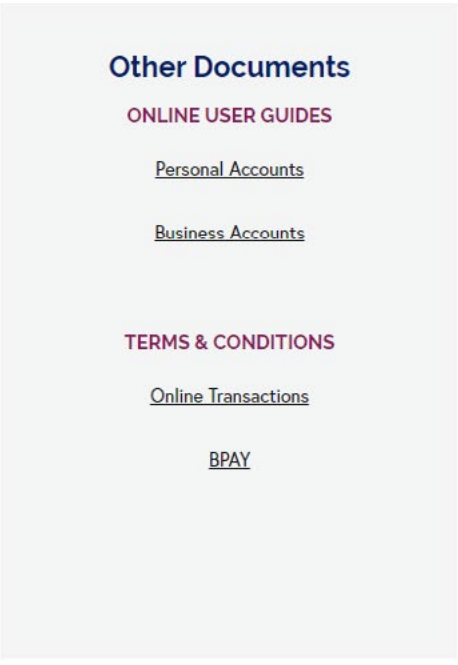
Terms & Conditions

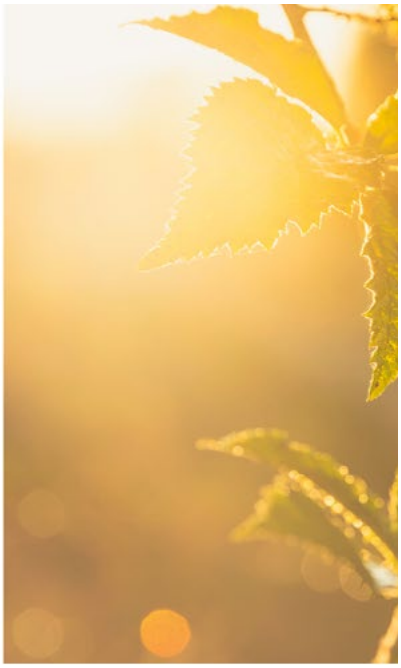
Read AIDF Terms & Conditions.

User Guides

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

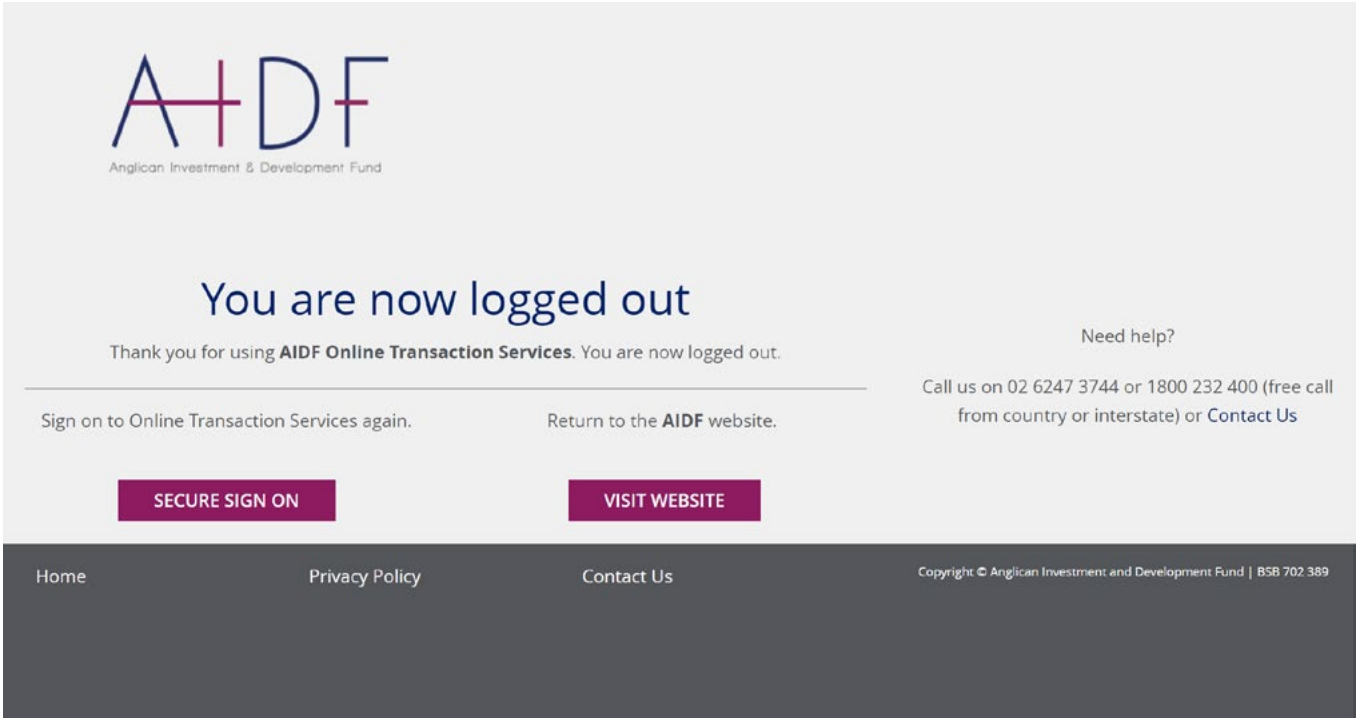
All the above documents are located under **Forms** on the AIDF website, as seen below.





LOGOUT

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



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

AIDF
Anglican Investment & Development Fund