# ANZ Transactive – Getting Started

Simplifying and connecting your digital services

## Getting Started

Welcome to ANZ Transactive – Trade Getting Started

The method of logging on will be determined by your role. Users who are Initiators, only using reporting functions or reviewing will logon through their username and password. Those users who have Admin, Authorisation, Full Access or any combination of entitlements will use their token device.

Upon logon, the initial screen you will see will be your Homepage Dashboard. This dashboard has a number of features, including:

- a top level navigation,
- your company details and also
- shortcuts to key functions such as:
  - Mail Messages,
  - Notifications,
  - Help,
  - User Settings and
  - My Links

Clicking on your username as shown here will bring up User Preferences which contains user information stored in Transactive – Trade on your behalf, based upon information provided in the application form that would have been submitted to ANZ. This information is also available via Reference Data main menu, then Users.

Clicking Close or Home will return you back to the dashboard.

## Navigating the Dashboard

The Home Dashboard shows available sections depending on the products your company has signed up for.

- Firstly, **Messages** which are any messages sent to your company from ANZ. For example: Discrepancy Notices or Correspondence
- **Notifications** are ones which have been sent from ANZ including Transaction Notifications
- Under **All Transactions**, these can be filtered by using the in-section drop-downs as shown
- Lastly, for **Pre-Debit Notifications** or Settlement Instruction requests, ANZ Transactive – Trade will notify you when your settlement/payment instructions are required. This will generally occur two days prior to the payment/settlement date. The Pre-Debit Notification section of the homepage dashboard will notify you of any items requiring settlement.

## Customising your Dashboard

You can customise your dashboard by including or excluding available sections and prioritising them into your specified order for convenience. Here you can select which dashboard items you want displayed. For example, whether or not you want to see Message Types, Notifications or All Transactions by selecting or deselecting as shown.

Next you can then prioritise the order to best suit your needs and click Update. You also have the option of Previewing, and then re-editing if desired prior to Save and Closing.

Just above the Customise tab, you have My Links - another handy tool to help you in your daily tasks. Here you can add your favourite Tasks such as commonly used reference data options or recently used trade instruments. Simply click on the cog icon, follow the prompts and save. This works in the same manner as the Customisation tool shown previously.

Lastly, the top banner menu offers you all the options you need to perform such actions as create instruments, view transactions, and update reference data options. Please note however that the options available will vary depending on your own security profile settings. A range of reports are available to users based on the products they transact and can be allocated on a per user basis.

Clicking on each Menu item produces a sub-menu, giving you options related to each section enabling you to complete your tasks. Should your session timeout at any point, ANZ Transactive - Trade will keep any work you have completed once saved.