

ANZ Transactive – Global Checklist

For customers banking in Hong Kong, India, Philippines, Singapore and Vietnam 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	Task 4
Payments	<input type="checkbox"/> Visibility of the 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"/> Generate Beneficiary Audit Report to verify details of your migrated beneficiaries from ANZ Transactive Cash Asia	<input type="checkbox"/> Create new templates in ANZ Transactive – Global		
Notifications and Alerts	<input type="checkbox"/> Enable payment in-channel notifications and email alerts	<input type="checkbox"/> Enable inward mandate in-channel notifications and email alerts	<input type="checkbox"/> Enable credit and debit advice in-channel notifications and email alerts	
System settings and customisation	<input type="checkbox"/> Review system authorisation settings, including payments (Company Administrators only)	<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.
Scheduled reports	<input type="checkbox"/> Create and schedule your balance and transaction reports from the Account Reports menu	<input type="checkbox"/> Create and schedule your payment reports from the Payment Reports menu		
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/35258114982425-Get-Ready-for-your-move-from-ANZ-Transactive-Cash-Asia>

