


# Uniting Online Quick Start Guide

## Tips on how to get started with Uniting Online

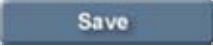


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### First time sign on

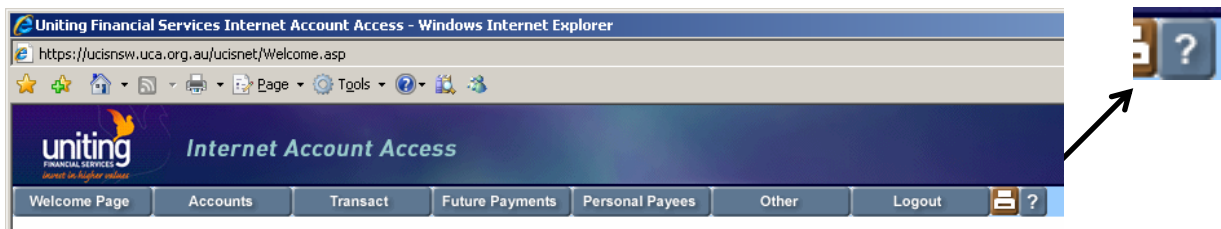
1. Enter the Uniting Financial Services website address ([www.unitingfinancial.com.au](http://www.unitingfinancial.com.au)) and click on the Uniting Online LOGIN button.
2. Enter the Login and Access Codes supplied by Uniting Financial Services and click on the  button. At this point, when you first enter the system, you will receive a message that your Access Code has expired. A new Access Code must be entered. The new code **must be** between 4 and 10 digits in length and can be alpha and/or numeric characters as well as any symbols i.e. @, #, etc.

For example: 1234RD@, GT5DR&

3. Enter the Access Code provided by Uniting Financial Services, and then enter your new Access Code. Enter the new Access Code again to verify the new Access Code. Click on  to save the changes.

### Help Function

After you have logged in to Uniting Online all screens have a Help Function.



This can be found in the top right hand corner of the screen by clicking on the '?' button (as shown above)

## Selecting more information


On any screen there are certain words or phrases that are displayed in a different colour from the other text. For example, on the Welcome screen there is a box containing a list of your investments and loans with the current balance for each.

As the mouse is moved over the differently colored text on screen, it may turn into a 'pointing hand'.

Wherever the 'pointing hand' appears, there is a link to other information. Simply click to be linked to other screens with more information.



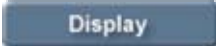

## Printing the page

Most browsers (Internet Explorer, Netscape, etc) do have a print selection option, however there is no options available (cannot choose Landscape) and, therefore you lose part of the print job. However, Uniting

Online has a print button  near the right hand end of the menu bar which normally will print the whole page in Portrait format without changing any print settings..

If this does not show the whole page then an alternative is to right click the mouse, selecting print, open "Options or Properties" and selecting Landscape can print the screen. Then select OK and proceed with printing. When finished, repeat the steps and reset to Portrait.

## Printing transaction listings



At the  button, a drop down list of options appears, select , choose the investment(s) or loan(s) you wish to see. Select the start and finish dates for the transaction listing by clicking the mouse in the box; a calendar will appear. The year can be moved up or down by clicking on the << or >> at each side of the month/year. The month can be changed via the drop down box at the right of the calendar box or clicking the < or > each side of the month/year. The day is selected by clicking on the day in the calendar. Then click on the  button. To print click on the  button.

## Transfer of funds

When entering information to transfer funds to an account externally, there are several rules to follow.


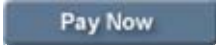
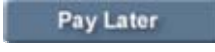

- 1/ The BSB (Bank/State/Branch) number consists of six digits. **Do not** include any spacing, dots or a hyphen. For example: ✓ 062000                      ×062 000                      × 062-000
- 2/ The account number must be one to nine digits in length. It must **not** have any alpha characters, spaces, dots or hyphens. For example: ✓ 123456789                      × 123456S1
- 3/ The account name must be all alpha or numeric characters and must **not** contain full stops, slashes or commas. Text can be upper or lower case or a mix of both.  
For example: ✓ AB AND CD SMITH                      × A.B. & CD SMITH

## Uniting Financial Services Cheque Requests




Click on , then on . Select the At Call Investment and then insert payee and address details (which will be printed on the cheque) or if no address is required, enter a 'full stop' in each of the address lines. The cheque will be posted to the mailing address last notified to Uniting Financial Services by the investment holder (or in the case of joint investment or business holders to the address that statements are sent to).


## Setting up future payments

To set up future payments, 'Full Access' is required. For At Call Investments which need more than one signature to operate the investment, two authorised signatories need to authorise the payment. At the

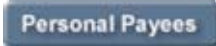




 button select the type of payment that will be effected and enter the details of the payment. Select  to choose a once only payment to be made immediately. Select  to choose a once only at a future date or a regular payment. For a regular payment, select the frequency and the date of first payment. The payment can then be approved, checked and confirmed by following the instructions on the screen. If the 2<sup>nd</sup> authoriser is not present, click on the  button. When the 2<sup>nd</sup> authoriser accesses Uniting Online the payment will be listed in their 'Pending Authorisation' list waiting for approval. Pending Authorisations will expire if not approved within 14 days of loading.

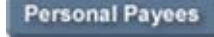

## Changing future payments


Click on the  button and a list of future payments appears. At the right of each payment list is the word '**More**'. Click on '**More**', and then on the next screen click on . Make the necessary changes and click  the amended details.


If the  button does not appear you cannot amend via Uniting Online and you will need to send us written instructions. Please complete a 'Periodic Payment Authority – Form 9' or 'Direct Debit Authority – Form 10' available from our website [www.unitingfinancial.com.au](http://www.unitingfinancial.com.au)


## Personal payees

It is possible to set up a list of personal payees to whom payments or transfers are made for use when payments or transfers differ in amount or regularity. Go to the  button, select the type of payment ( ,  or  ). Load the necessary information and then click on .

To change the information, pay the payee or delete the payee, select . A list of personal payees is displayed. To pay the payee, click on **Pay** next to the payee name and enter the amount and proceed as normal. To change the details, click on **Change** next to the payee and then simply alter the details and click on .

To delete, click on **Change** next to the payee name and click on .

**NOTE:** Established Personal Payees templates are stored with the Authorised Signatory and not with the Church Organisation. An alternative for Church organisations is  where the information is held against the investment. When office bearers change the information still remains with the investment and is available to the new office bearers when they arrange for Uniting Online access.

For more information on  download our 'Uniting Online – Multitrans' from our website [www.unitingfinancial.com.au](http://www.unitingfinancial.com.au)

## Trouble Shooting

If you are having problems using Uniting Online we have several documents that may help solve these problems.

These are available from our website <http://www.unitingfinancial.com.au/pages/login.asp?plid=5>



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