

PRINTING STATEMENTS

At the *Other* button, a drop down list of options appears, one being *Statement*. Click on this; choose the account or accounts you wish to see.

Select the start and finish dates for the statements by moving the mouse pointer over 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. 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. The day is selected by clicking on the day in the calendar.

To print, either click on the printer icon or use the right mouse button but ensure that the printing is in Portrait.

SETTING UP FUTURE PAYMENTS

To set future payments, 'Full Access' is required. For those accounts which need more than one signature to operate the account, two authority signatories need to be present to authorise the payment.

At the payments button select the type of payment that will be effected and enter the details of the first payment. Then select *Pay Later* to choose a once only 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.

CHANGING FUTURE PAYMENTS

Click on the *Future payments* 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 *Modify*. Make the necessary changes and save the amended details.

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 *Personal Payees* button; select the type of payment (*Transfer, or External transfer*). Load the necessary information and then click on *Update*.

To change the information, pay the payee or delete the payee, select *Personal Payees*. 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 *Update*.

To delete, click on *Modify* next to the payee name and click on *Delete*. ***If you delete a payee from the list and you do not wish to make any further payment! check your future payments list as well and delete the details there.***



QUICK TIPS

FOR

CDF ONLINE INTERNET USERS

Catholic Development Fund

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QUICK TIPS FOR CDF INTERNET ACCESS USERS

ANY TIME

Your computer with Internet access has just become a powerful force in managing your CDF accounts.

With the introduction of CDF Online, you are now able to:

- Transfer funds to CDF accounts and External Bank Accounts
- Obtain Account Balances
- View and Print Transaction Listings
- View Interest Earned

HOW

You must have Internet Explorer 5

Log onto: <http://www.cdfcatholicwa.com>

1. Select the Internet CDF Online option
2. Go to login here
3. Enter your Client Number and your password
4. Select which CDF account you wish to transact from
5. Use the menu bars to decide which type of transaction you wish to perform

SECURITY

The security system of CDF uses the same level of encryption as other financial institutions. This way you can be sure that your accounts are safe from fraudulent transactions.

FIRST TIME SIGN ON

Log onto: <http://www.cdfcatholicwa.com> click on Internet Access, and then click on login here.

Enter the Client Number and Password supplied by CDF. At this point, when clients first enter the system, they are told their password has expired. A new password must be entered and this is a password of the client's choice. It must be between 6 and 12 digits in length and contain at least 2 numeric characters.

For example: **Yes) ARCHDIOC23**
No) ARCH4

Enter the password provided by CDF, then enter the new password, then enter the new password again to verify it.

This password will last for up to one year. Passwords cannot be re-used until two others have been used between times.

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 all your accounts with the current balance for each.

As the mouse is moved over the text on screen, it will 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 do not have a print selection this means a client can print but cannot Landscape and, therefore, loses half the print however, right clicking the mouse, selecting opening Options, Properties or Basics and select Landscape can print the screen. Then select proceed with printing. When finished, reset to Portrait.

TRANSFER OF FUNDS

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

The BSB (Bank/State/Branch) number consists of six digits. It must *not* have any spacing, hyphen, dash, dot etc...

eg: **Yes 062000** No X 062 000 No X 062-000

The account number must be one to nine characters length. It must *not* have any alpha characters, dots or hyphens.

eg: **Y 123456789** N X 123456 S 1

The account name must be all alpha characters and must *not* contain ampersand (&) or commas. It can be upper or lower case or a mix of both.

eg. **AB AND CD SMITH**
Not A.B & CD SMITH