

ScotiaConnect® Digital Banking

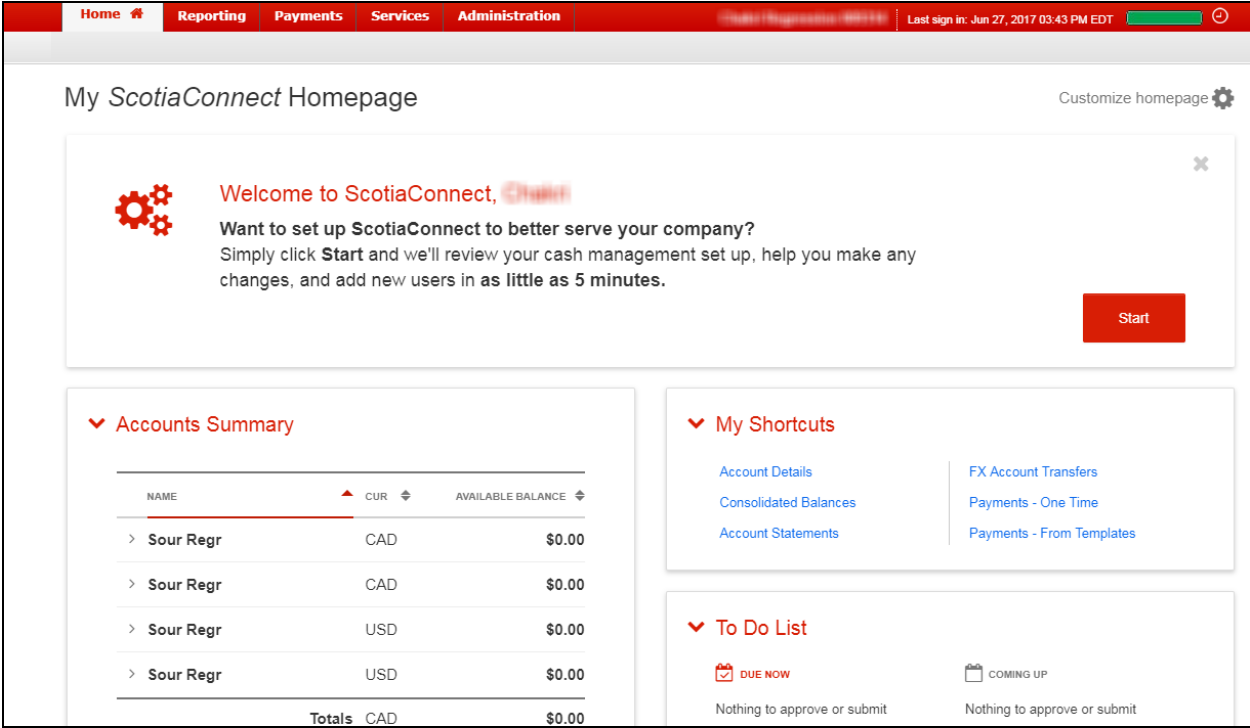
Welcome Guide Quick Reference

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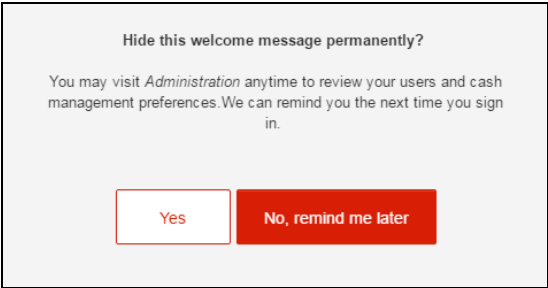
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Welcome Guide

When you sign into ScotiaConnect for the first time, you will be prompted with a welcome guide. This optional guide can be used to help you quickly set up your service and is only available to Super Users. Once it has been completed it will no longer be available. It will also disappear automatically after a few weeks.

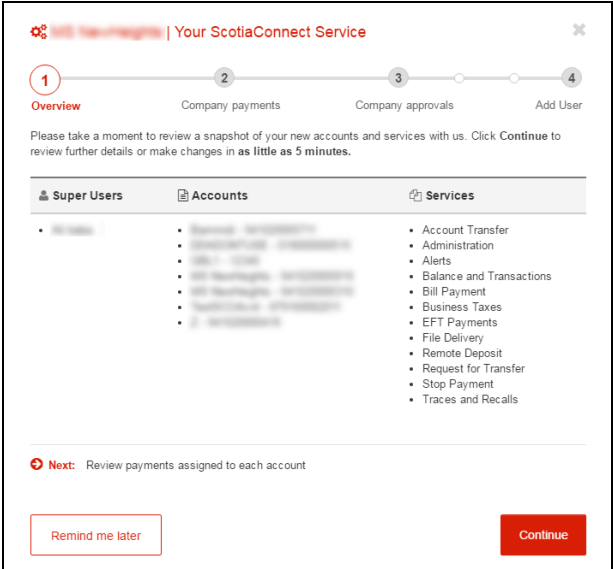


To begin, click the 'Start' button. If you do not wish to use the guide you can close it by clicking the X icon. You will be given the option to see the guide next time you sign in. All administration of users and entitlements can be made at any time from the 'Administration' menu in ScotiaConnect.



Your ScotiaConnect Service

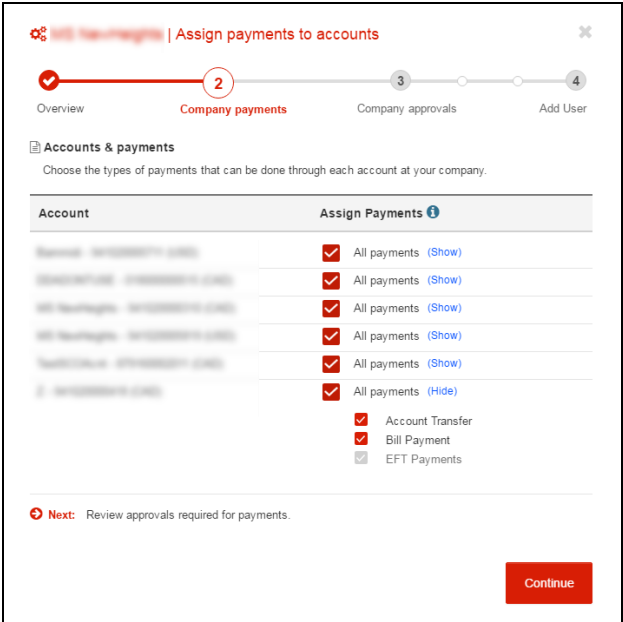
The first screen will display your existing Super Users, accounts and services. Please take a moment to confirm this is correct. If there are any issues with your setup, please contact your Scotiabank representative.



Assign Payments to Accounts

Please note that this step will be skipped if you only have one account.

Select the payments you wish to authorize by account. Note that if a payment service does not give you the option to select/de-select it indicates that they payment service is already setup to work with that specific account.



To expand the list for payment service, click the 'Show' text link. All services will be selected by default. You can deselect services by placing a check box beside the ones you would like to remove. If you remove a service it means that no one from your company will be able to make that type of payment from the specified account.

Approval Levels per Payment

Please note that this step will be skipped if you only have one Super User.

The next step is to setup approvals for your payment services. You can choose to have no approvals or one approval. By default no approvals will be setup for all your payment services. If you set an approval for a payment type, those payments will require approval from a second user prior to submitting them for processing.

Approval levels per payment

Overview Company payments **Company approvals** Add User

Set payment approval levels

Approvals act as another layer of security for your payments. Select the number of approvals needed for each payment type at your company.

Payment Type	Number of approvals required ⓘ	
Account Transfer	<input type="radio"/> None (0)	<input checked="" type="radio"/> One (1)
Bill Payment	<input type="radio"/> None (0)	<input checked="" type="radio"/> One (1)
EFT Payments	<input type="radio"/> None (0)	<input checked="" type="radio"/> One (1)
File Delivery	<input checked="" type="radio"/> None (0)	<input type="radio"/> One (1)
Request for Transfer	<input type="radio"/> None (0)	<input checked="" type="radio"/> One (1)
Stop Payment	<input type="radio"/> None (0)	<input checked="" type="radio"/> One (1)

Next: Add a new user with permissions for ScotiaConnect

[Back](#) [Continue](#)

Add User

You have the choice to add new users to ScotiaConnect. If you do not wish to add any users, simply click the 'skip add user' text link next to the 'Continue' button.

To add a user, please enter all the required information. The secret word is to be shared with the new user only. It will be needed to register their ScotiaConnect online as well as to confirm their identity when calling for support.

Add user | Enter details

Overview Company payments Company approvals **Add User**

User details

There are three steps to adding a user: entering their name and contact information, assigning permissions, and ordering tokens. Begin with entering the user's name and contact information.

First name * Last name *

Phone for work * Email for work *

Job title (Optional)
Select user's job title Secret word *

Next: Assign permissions for this user

[Back](#) [Skip add user](#) **Continue**

After clicking 'Continue' you will need to assign permissions for the user. Permissions with a 'Show' text link next to their name can be expanded to customize account access.

Add user | Permissions

Overview Company payments Company approvals **Add User**

Set permissions for [User Name]

Please select the level of access you want this new user to have.

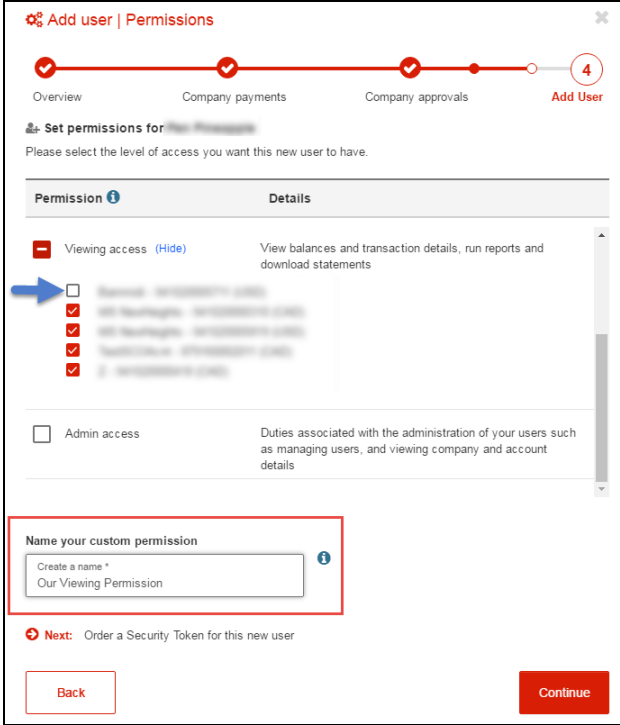
Permission	Details
<input checked="" type="checkbox"/> Viewing access (Hide)	View balances and transaction details, run reports and download statements
<input checked="" type="checkbox"/> [Account Name]	
<input checked="" type="checkbox"/> [Account Name]	
<input checked="" type="checkbox"/> [Account Name]	
<input checked="" type="checkbox"/> [Account Name]	
<input checked="" type="checkbox"/> [Account Name]	
<input type="checkbox"/> Admin access	Duties associated with the administration of your users such as managing users, and viewing company and account details

Next: Order a Security Token for this new user

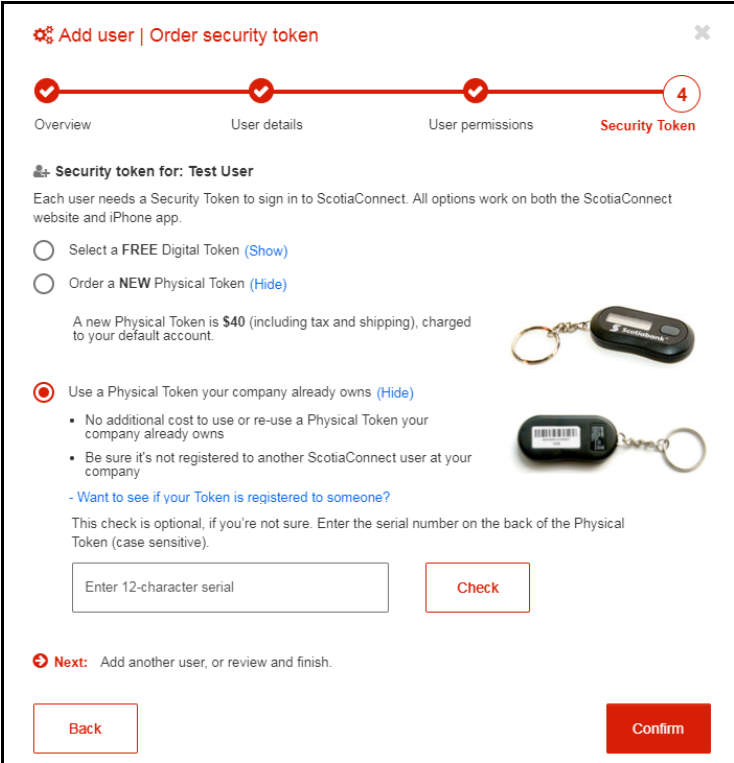
[Back](#) **Continue**

Custom Permissions

If you choose to make changes to the Viewing and Payment Access preset permissions, you will be creating a custom permission. For example, if you remove an account from Viewing Access, you will be prompted to enter a custom name for this access. You can then assign this same custom permission to any other users going forward.

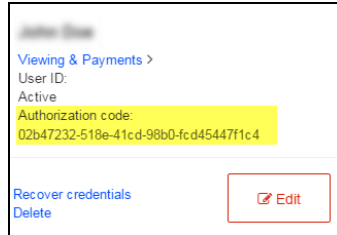


Select the Security Token option that best meets your needs then click 'Confirm' to finalize the request. If you select 'Order a New Physical Token' you must then indicate the delivery destination. 'Business Address on file' will show the company address we have on file. Confirm it is correct before clicking 'Submit'. 'A different address' will allow you to enter an address free form. **Note:** PO. Boxes are not valid delivery addresses for physical tokens.



It is important to note that the new user will need the authorization code to register. The code will be found on the Administration screen after you select 'Finish.'

The unique authorization code for the user(s) you created will be found on this page.



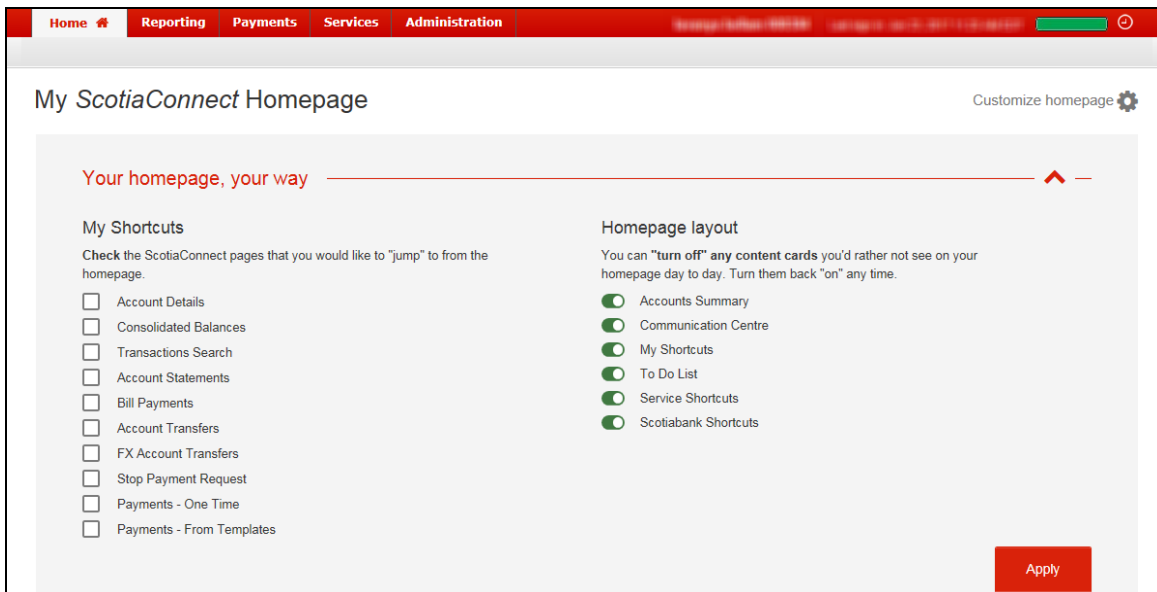
All changes to users or entitlements can be made via this screen. **For more information, please see the separate quick reference guides for user and company permissions.**

Customizable Home Page Layout

You can customize the layout of the main page of ScotiaConnect by clicking 'Customize homepage'.

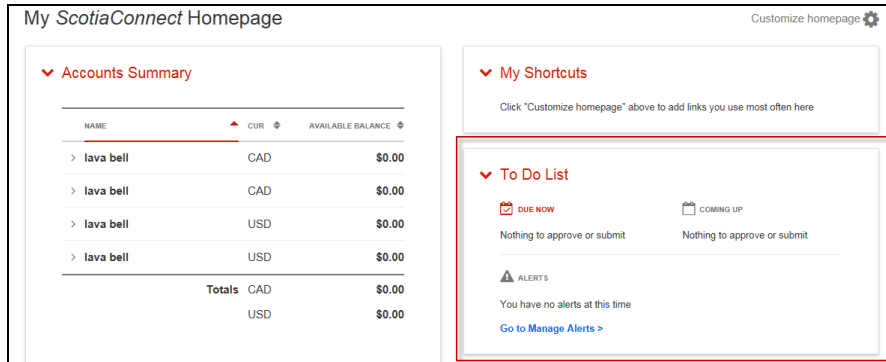


Once the page loads you will be able to edit the layout of the homepage. Select which shortcuts you would like to see by placing a checkmark next to them. Select which content cards you would like displayed on the homepage by moving the sliders by clicking on them. The sliders are all 'On' by default as shown in the screenshot below. Click on any you would like to turn off then click 'Apply' to finalize the customization.



To Do List

The To Do List is used to notify you of items that you are able to action – for instance, payments awaiting approval or submission. The To Do list also has an ‘Alerts’ section where you will see a list of alerts, and a link to the Manage Alerts screen.



For Further Assistance

Need Help?

On any ScotiaConnect page, you will find a ‘Need Help?’ link. Clicking that link will provide targeted help topics relevant to the page you’re currently viewing.

[Need Help?](#)

Online Customer Support

- Select the Help option at the top right of your browser and select to open our ‘Online Customer Support’ knowledge base. A new window will be displayed and you may type your question.

Tutorial Videos

- The Tutorial Video link at the top right of your screen will open the Online Resource Centre with videos, documents and more to help you find answers to your questions regarding Scotiabank’s products and services.

Technical Support Help Desk - Monday through Friday, 8:00 a.m. to 8:00 p.m. ET.

- 1-800-265-5613 - Toll-free number within North America
- 416-288-4600 - Local Toronto area customers
- 416-701-7351 - Fax
- (800) 463-7777 - pour le service en français
- Email: hd.ccebs@scotiabank.com. Your email will be answered within 24-48 business hours.
- To book product training, please send an email to gtb.training@scotiabank.com

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