ScotiaConnect® Digital Banking

Welcome Guide Quick Reference

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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.

	Home 🐔	Reportin	g Payments	Services	Administration	(That) (Tragenation (109774)	Last sign in: Jun 27, 2017 03:43 PM EDT
Ν	/ly Sc	otiaConr	<i>ect</i> Home	epage			Customize homepage 🏠
	¢ ~ Ac	Wa Si	mply click Sta r anges, and ac	ScotiaCor rt and we'l	nnect to better serv	nanagement set up, help you make a	Iny Start
						Account Details	FX Account Transfers
		NAME		CUR 🖨	AVAILABLE BALANCE 🌲	Consolidated Balances	Payments - One Time
	>	Sour Regr		CAD	\$0.00	Account Statements	Payments - From Templates
	>	Sour Regr		CAD	\$0.00		
	>	Sour Regr		USD	\$0.00	✓ To Do List	
	>	Sour Regr		USD	\$0.00	DUE NOW	COMING UP
			Totals	CAD	\$0.00	Nothing to approve or submit	Nothing to approve or submit

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.

	Hide this welc	ome message permanently?
,		ion anytime to review your users and cash We can remind you the next time you sign in.
	Yes	No, remind me later

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.

(1)	2	3 0	-04
Overview	Company payments	Company approvals	Add Use
	to review a snapshot of your new a r make changes in as little as 5 m	accounts and services with us. Click inutes.	Continue to
🚢 Super Users	Accounts	🖆 Services	
	Record Accession Record of Accession Records and Accession Records and Accession Accession and Accession Access	Account Transf Administration Alerts Balance and Tra Bill Payment Business Taxes FT Payments File Delivery Remote Deposit Request for Tra Stop Payment Traces and Rec	ansactions nsfer
S Next: Deview pay	ments assigned to each account		
• nova neview pay	mente assigned to each account		

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.

Overview	2 Company payments	3 Company approvals	Add Use
		company approvate	
Accounts & payme			
Choose the types of pa	ayments that can be done thr	ough each account at your company.	
Account		Assign Payments 🕄	
have become	- 11000	All payments (Show)	
	(dec) = (140)	 All payments (Show) 	
at human and	1000 C (1000	All payments (Show)	
at hereingen and		All payments (Show)	
hadding a stress	100 CAD	All payments (Show)	
1		All payments (Hide)	
		Account Transfer	
		Bill Payment	
		 EFT Payments 	
Next: Review approv	als required for payments.		
	· · · · ·		

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.

Overview	Company payments		Company	approv	vals	Add User
Set payment appro pprovals act as another ayment type at your cor	layer of security for your pay	yments.	Select the nu	mber of	approvals ne	eded for each
Payment Type		Nun	nber of app	rovals	required ዐ	
Account Transfer		0	None (0)	۲	One (1)	
Bill Payment		0	None (0)	۲	One (1)	
EFT Payments		0	None (0)	۲	One (1)	
File Delivery		0	None (0)	0	One (1)	
Request for Transfer		0	None (0)	۲	One (1)	
Stop Payment		0	None (0)	۲	One (1)	

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.

O		 o	-0-4
Overview	Company payments	Company approvals	Add Use
🗄 User details			
	s to adding a user: entering their nam in with entering the user's name and	ne and contact information, assigning contact information.	g permissions, ar
First name *		Last name *	
		·	
Phone for work *		Email for work *	
Job title (Optional) Select user's job ti	tle 👻	Secret word *	
Novt Accian no	ermissions for this user		

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.

Overview	Company payments	Company approvals	Add Use
≗+ Set permissions f			
Please select the level of	of access you want this new us	er to have.	
Permission 🛈	Details		
Viewing access		nces and transaction details, run rep statements	orts and
	14-1228801"- (1482)		
 	ages in contract of the		
~	to Presser (N)		
✓	100/1 (AD)		
Admin access		sociated with the administration of yo ing users, and viewing company and	
/ aniin access	as manag		

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.

Overview	Company payments	Company approvals	Add Us
+ Set permissions fo	Par Pressents		
lease select the level of	access you want this new us	er to have.	
Permission 🜖	Details		
 Viewing access () 		nces and transaction details, run repo statements	orts and
	an succession of the		
 ✓ ✓ 	A PERSONAL CAR.		
Admin access		sociated with the administration of yo ing users, and viewing company and	
ame your custom perm	nission		
Create a name *		0	
Our Viewing Permission	n		
	ity Token for this new user		

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.

Overview	User details	User permissions	Security Token
≗+ Security token f	for: Test User		
Each user needs a Se website and iPhone a	ecurity Token to sign in to ScotiaC app.	onnect. All options work on both	the ScotiaConnect
Select a FREE	Digital Token (Show)		
Order a NEW P	Physical Token (Hide)		
A new Physica to your default	I Token is \$40 (including tax and s account.	hipping), charged	AND FROM THE
Use a Physical	Token your company already own	s (Hide)	
 No additional company alreet 	I cost to use or re-use a Physical T eady owns	Token your	
 Be sure it's n company 	ot registered to another ScotiaCo	nnect user at your	Charles (
- Want to see if	your Token is registered to some	one?	
This check is o Token (case se	ptional, if you're not sure. Enter th ensitive).	e serial number on the back of th	e Physical
Enter 12-cha	racter serial	Check	

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.

Home # Reporting Payments Services Administration	
My ScotiaConnect Homepage	Customize homepage 🌺
Your homepage, your way	∧ -
My Shortcuts	Homepage layout
Check the ScotiaConnect pages that you would like to "jump" to from the homepage.	You can "turn off" any content cards you'd rather not see on your homepage day to day. Turn them back "on" any time.
Account Details	C Accounts Summary
Consolidated Balances	Communication Centre
Transactions Search	My Shortcuts
Account Statements	To Do List
Bill Payments	Service Shortcuts
Account Transfers	C Scotiabank Shortcuts
FX Account Transfers	
Stop Payment Request	
Payments - One Time	
Payments - From Templates	
	Apply

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.

cotiaConnect	Homepage			Customize
ccounts Summa	у		✓ My Shortcuts	
NAME	▲ CUR ♦ AV	AILABLE BALANCE	Click "Customize homep	age" above to add links you use most often her
> lava bell	CAD	\$0.00	✓ To Do List	
> lava bell	CAD	\$0.00		
> lava bell	USD	\$0.00		COMING UP
> lava bell	USD	\$0.00	Nothing to approve or su	bmit Nothing to approve or submit
	Totals CAD	\$0.00	ALERTS	
	USD	\$0.00	You have no alerts at this	s time

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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