

ScotiaConnect® Digital Banking

Adding Users and Setting User Permissions Quick Reference Guide

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Note only Super Users and users with administration privileges can complete the steps outlined in this guide.

User Permissions

Adding New Users

To add new users to ScotiaConnect, click on the Administration tab at the top of the ScotiaConnect menu. Below your list of users, you will see the button to add a new user.

User & Company Permissions

Users & Permissions

Test User
Super User >
User ID: 0001100001
Status: Incomplete
[Delete](#) [Edit](#)

Test User1
Custom: [Sample Custom Permission](#) >
User ID:
Status: Active
Authorization code:
[Recover credentials](#) [Delete](#) [Edit](#)

[Add user](#)

Company Payments Allocation

Payment types can be assigned to all or to specific accounts. Your company is set up as follows:

ACCOUNTS	PAYMENT TYPES
New Reg: 000000000111 (140)	<ul style="list-style-type: none"> Account Transfer
New Reg: 000000000110 (140)	<ul style="list-style-type: none"> Account Transfer
New Reg: 000000000110 (140)	<ul style="list-style-type: none"> Account Transfer Bill Payment EFT Payments
New Reg: 000000000111 (140)	<ul style="list-style-type: none"> Account Transfer Bill Payment EFT Payments

[Edit](#)

Company Approvals

Transactions can require another user's approval before it's submitted. Your company requires:

Account Transfer	NONE
Bill Payment	NONE
EFT Payments	ONE
Stop Payment	NONE

[Edit](#)

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 used to confirm their identity when calling us for support.

Select the Security Token option that best meets your needs then click 'Submit' to finalize the request.

If you select 'Order a New Physical Token' the company address will be displayed, confirm it is correct before clicking 'Submit'.

Once you click submit you will receive a confirmation message and the user will show in 'Active' status.

Assigning Permissions to New Users

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

1 Enter Details 2 **Set permissions** 3 Order security token

Set permissions for [user name]

Permission	Details
<input type="checkbox"/> Super User	A Super User will have full access to viewing, payment, and administration privileges, plus the ability to manage company and account details
<input checked="" type="checkbox"/> Payments access (Show)	Create, manage and submit payment transactions
<input checked="" type="checkbox"/> Viewing access (Hide)	View balances and transaction details, run reports and download statements

☒ [Permission Name]
☒ [Permission Name]
☒ [Permission Name]
☒ [Permission Name]
☒ [Permission Name]

Name your custom permission

Create a name *

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.

Next, specify what type of token the user will login with. If you select a Physical Token you will need to specify whether you need a new one to be shipped or if you will use an existing token. If a new token is being shipped your company address will display, if there is an error or you wish to ship to a different address select 'A different Address' (PO Boxes are not valid shipping addresses). If you opt to use an existing token you can enter the serial number from the back of the token to check whether the token is currently in use, and if so, delete the old user.

Add user | Order security token

Overview User details User permissions **Security Token**

Security token for: Test User

Each user needs a Security Token to sign in to ScotiaConnect. All options work on both the ScotiaConnect website and iPhone app.

☐ Select a **FREE** Digital Token ([Show](#))

☐ Order a **NEW** Physical Token ([Hide](#))

A new Physical Token is **\$40** (including tax and shipping), charged to your default account.

☒ Use a Physical Token your company already owns ([Hide](#))

- No additional cost to use or re-use a Physical Token your company already owns
- Be sure it's not registered to another ScotiaConnect user at your company

[- Want to see if your Token is registered to someone?](#)

This check is optional, if you're not sure. Enter the serial number on the back of the Physical Token (case sensitive).

Enter 12-character serial

Check

Next: Add another user, or review and finish.

Back **Confirm**

Once you click 'Save & close' you will be redirected to the Administration screen. An email will be sent to the user with information on how to register for ScotiaConnect.

Edit Existing Users

To edit an existing user, locate the user from the 'User & Company Permissions' screen and click the 'Edit' icon to make changes to their details and/or permissions.

Test User

[Super User >](#)

User ID:

Status: Incomplete

[Delete](#) **Edit**

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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