

ScotiaConnect® Electronic Banking

ScotiaConnect Alerts

Table of Contents

| | |
|---|---|
| Introduction | 2 |
| Setting Up Alert Entitlements for Users | 2 |
| Setting up Alerts..... | 3 |
| Approving Alerts | 6 |
| Sample Email Notification..... | 7 |
| For Further Assistance | 8 |

Introduction

The Alert Service is a feature which allows you to monitor activity in ScotiaConnect. Alerts can be displayed on the home page or setup to be emailed to a specific user group. An alert will only be sent once the specific activity has occurred. There are two types of alerts - **Standard and Custom**.

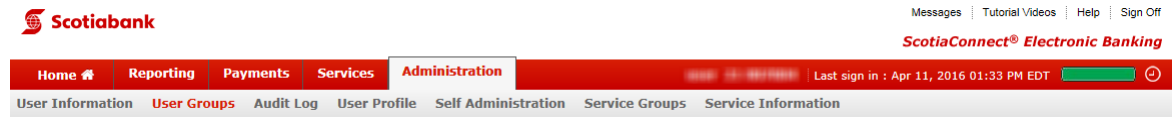
Standard Alerts - setup alerts created by the system, based on the services set-up in the company profile.

Custom Alerts - create custom alerts under the following categories

- Balance thresholds (i.e. above or below thresholds)
- Transaction (i.e. incoming wires, cheques)
- Service notifications (i.e. payments pending approval)

Setting Up Alert Entitlements for Users

Alerts will be available for Super Users however the ability to access and setup alerts must also be setup for all other user groups. To provide access to alerts, a super user or user with administration entitlements must go to the User Groups tab under the “Administration” menu in ScotiaConnect.



Once you are on the page you will need to select the user group by clicking on the group name. This will open the user group information. Select the Alerts service by clicking on the checkbox.

| | | | |
|-------------------------------------|--|---------------|--|
| <input checked="" type="checkbox"/> | File Delivery | 00:00 - 23:59 | This service provides the ability for a customer to upload and download files to and from the bank through an Internet browser. |
| <input checked="" type="checkbox"/> | Administration | 00:00 - 23:59 | This service provides the ability to give each user access to the functions and accounts they require. |
| <input checked="" type="checkbox"/> | Batch Account Statements | 00:00 - 23:59 | This service provides the ability to perform batch account statements in MT940 or BAI2 format. |
| <input checked="" type="checkbox"/> | Alerts | 00:00 - 23:59 | This service provides the ability to email alerts, create your own custom alerts. Custom alerts can be made for various transactions, balance thresholds and service approvals , and can be emailed as well as displayed on ScotiaConnect. |
| <input checked="" type="checkbox"/> | Remote Deposit | 08:00 - 16:00 | Remotely Deposit your cheques anytime, from the comfort of your office. Remote Deposit Service saves you time and gets you access to your money faster! |

Then click on the “Alerts” link to customize the entitlements.

User Group Information - Service Privilege Details

| | | | |
|-----------------|---------|-------|----------------------------|
| User Group Name | [Group] | | |
| Service Name | Alerts | Hours | 00:00 - 23:59 Eastern Time |
| | | | Cancel Continue |

Functions belonging to the Alerts service

The functions below are associated with this service. Place a check mark in each box to allow access.

| Assign | Function | Assign | Function |
|-------------------------------------|--|-------------------------------------|---|
| <input checked="" type="checkbox"/> | Custom Alerts | <input checked="" type="checkbox"/> | Standard Alerts |
| | <input checked="" type="checkbox"/> - Approve | | <input checked="" type="checkbox"/> - Send Email Request |
| | <input checked="" type="checkbox"/> - Create | | <input checked="" type="checkbox"/> - Approve Email Request |
| | <input checked="" type="checkbox"/> - Modify Alerts created by Other users | | |
| | <input checked="" type="checkbox"/> - Send Email Request | | |

If no approvals are required, the 'Approve' functions will not be displayed.

If you want users in this group to have access to create, modify and setup emails for custom alerts, enter the checkboxes as needed. In addition, you can customize whether users in this group have the ability to setup email notifications for standard alerts. Once complete, click continue to return to the group screen. Ensure to save your changes.

Setting up Alerts

In order to setup alerts, the user can select the "Manage Alerts" link on the home page of ScotiaConnect.


The screenshot shows the ScotiaConnect Electronic Banking interface. At the top, there is a navigation bar with the ScotiaBank logo and links for Messages, Tutorial Videos, Help, and Sign Off. Below this is a red navigation menu with tabs for Home, Reporting, Payments, Services, and Administration. The main content area is divided into several sections: 'My Activities' with a table of pending items, 'My Alerts' with a 'View All | Manage Alerts' link (highlighted by a red arrow), 'Account Summary', 'Messages', and 'Related Links' with various service and payment links.

| | To Approve | To Submit |
|---------------------------------|------------|-----------|
| Same Currency Account Transfers | 0 | 1 |
| Bill Payments | 3018 | 1 |
| Integrated Payments | 7 | 34 |
| Stop Payments | 0 | 2 |

Another option is to select "Alerts" from the menu under the "Reporting" tab at the top of the ScotiaConnect screen.


Messages | Tutorial Videos | Help | Sign Off
ScotiaConnect® Electronic Banking
Home | **Reporting** | Payments | Services | Administration | 12:50 PM EDT | Last sign in: Apr 11, 2016 12:50 PM EDT ⌂
Reports | Alerts | ⌂

Available Alerts

Print 

Search Alerts

Type:

Service:

Status:

| <input type="checkbox"/> | Name | Type | Service | Status | Share with |
|--------------------------|--|----------|--------------------------|---------|--------------------------|
| <input type="checkbox"/> | Same Currency Account Transfer is rejected | Standard | Account Transfer | Pending | My Group |
| <input type="checkbox"/> | FX Account Transfer is rejected | Standard | Account Transfer | Pending | My Group |
| <input type="checkbox"/> | Bill Payment is rejected | Standard | Bill Payment | Active | My Group |
| <input type="checkbox"/> | Business Tax is rejected | Standard | Bill Payment | Active | My Group |
| <input type="checkbox"/> | Import Recipients are Completed | Standard | Integrated Payments | Active | Setup |
| <input type="checkbox"/> | Request for Transfer is rejected | Standard | Request for Transfer | Pending | My Group |
| <input type="checkbox"/> | Returned EFT Payments | Standard | EFT Payments | Active | My Group |
| <input type="checkbox"/> | Returned Remittance Advices | Standard | Rem Advice | Active | My Group |
| <input type="checkbox"/> | Transaction All Credit Transactions Equal to 88.00 | Custom | Balance and Transactions | Pending | My Group |
| <input type="checkbox"/> | NOC EFT Payments | Standard | EFT Payments | Active | My Group |

On this page you can create new alerts, search for existing alerts and modify/delete existing alerts. Note that you cannot delete standard alerts. The only option you have with standard alerts is to add or remove email notifications.

To create an alert, click the “Create Alert” button. This will open the ‘Create Alert’ page.

Create Alert
✕

Print

Alert Setup
[Need Help?](#)

Category: Transaction ▼

Accounts: Available Account IDs

>>
>
<
<<

Selected Accounts

Transaction Type:

Please select

All Transactions

All Debit Transactions

All Credit Transactions

Cheques

Deposits

Sundry Debits

Sundry Credits

Chargebacks

Credit Line Transactions

Investment Transactions

Merchant & POS Transactions

Service Fees

Interest

Incoming Wires

Outgoing Wires

Bill Payment

Account Transfer

Alert at Amount: Equal to ▼

Send Email:

Share Alert: Yes No *Alerts will be shared based on entitlements to underlying account and/or service

Cancel Submit

Alert Categories:

Balance – An alert that will notify you when one or more account balances is equal to, less than or greater than a specified amount. Example: You could setup an alert to notify you when any account balance exceeds \$10,000.

Transaction – An alert that will notify you whenever a specific transaction is equal to, less than or greater than a specified amount. The transaction type can be specific or can include any transaction:

- Please select

All Transactions

All Debit Transactions

All Credit Transactions

Cheques

Deposits

Sundry Debits

Sundry Credits

Chargebacks

Credit Line Transactions

Investment Transactions

Merchant & POS Transactions

Service Fees

Interest

Incoming Wires

Outgoing Wires

Bill Payment

Account Transfer

Example: You could setup an alert to notify you when an incoming wire over \$100 is credited to a specific account.

Service – An alert that will notify you when a payment for a specific service and a specific status is equal to, less than or greater than a specified amount. Example: You could setup an alert to tell you when any EFT payments over \$1.00 need to be submitted.

Send Email – When the alert is triggered ScotiaConnect will also send an email notification to all the users in your user group. Note if you want the email to be sent to user in other groups, you must set “Share Alert” to yes.

Share Alert: Yes No *Alerts will be shared based on entitlements to underlying account and/or service

Share with:

User Groups Available

User Groups Assigned

GroupName

>>
>
<
<<

Share Alert – To send email notifications to users in other groups, select “yes” to share alert and choose the user group(s) you wish to share this alert with.

Approving Alerts

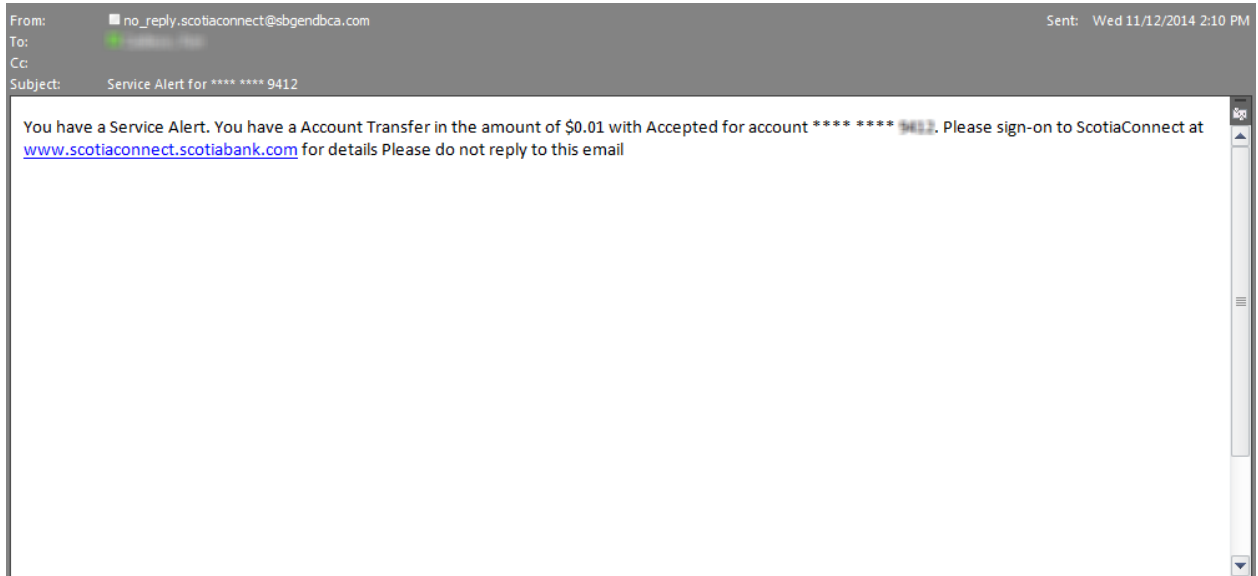
After an alert is created, it may show a status of “pending”. An alert in pending status will not trigger until it is activated.

| | | | | | | Item: 1 - 10 of 125 |
|-------------------------------------|--|----------|--------------------------|---------|--------------------------|------------------------------------|
| | | | | | | First Previous 1 2 3 4 5 Next Last |
| <input type="checkbox"/> | Name | Type | Service | Status | Share with | |
| <input type="checkbox"/> | Same Currency Account Transfer is rejected | Standard | Account Transfer | Pending | My Group | |
| <input type="checkbox"/> | FX Account Transfer is rejected | Standard | Account Transfer | Pending | My Group | |
| <input type="checkbox"/> | Bill Payment is rejected | Standard | Bill Payment | Active | My Group | |
| <input type="checkbox"/> | Business Tax is rejected | Standard | Bill Payment | Active | My Group | |
| <input type="checkbox"/> | Import Recipients are Completed | Standard | Integrated Payments | Active | Setup | |
| <input checked="" type="checkbox"/> | Request for Transfer is rejected | Standard | Request for Transfer | Pending | My Group | |
| <input type="checkbox"/> | Returned EFT Payments | Standard | EFT Payments | Active | My Group | |
| <input type="checkbox"/> | Returned Remittance Advices | Standard | Rem Advice | Active | My Group | |
| <input type="checkbox"/> | Transaction All Credit Transactions Equal to 88.00 | Custom | Balance and Transactions | Pending | My Group | |
| <input type="checkbox"/> | NOC EFT Payments | Standard | EFT Payments | Active | My Group | |

Delete
Approve

This means that another user with access to the Alerts entitlements and with approval authority for alerts must log into ScotiaConnect and select the alert and the “approve” button to activate the alert.

Sample Email Notification



For Further Assistance

Need Help?

On ScotiaConnect, you may use the 'Need Help?' in order to obtain information about the specific menu.

[Need Help?](#)

Online Customer Support

- You may select the Help option at the top right corner of your browser and select "Online Customer Support" – a new window will be displayed and you may type your question.



[Messages](#) | [Tutorial Videos](#) | [Help](#) | [Sign Off](#)

ScotiaConnect® Electronic Banking

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 gtbgics.training@scotiabank.com

® Registered trademarks of the Bank of Nova Scotia.