

ScotiaConnect Alerts

Quick Reference Guide

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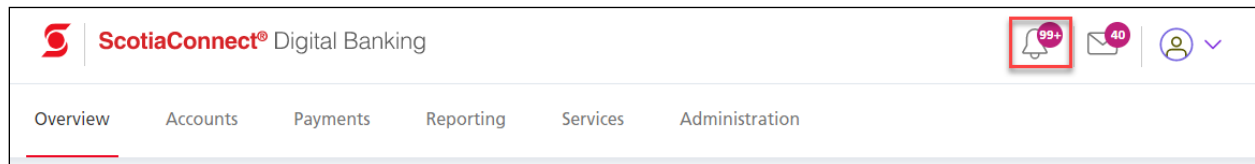
INTRODUCTION

Alerts allow you to monitor activity in ScotiaConnect. Once triggered, alerts can be accessed any time by clicking on the 'Alerts' link within the top navigation bar which will display a total count of unread alerts. You can also have an email sent to you when an Alert is triggered.

Standard alerts are defined automatically and keep you up-to-date on important account and payment activity.

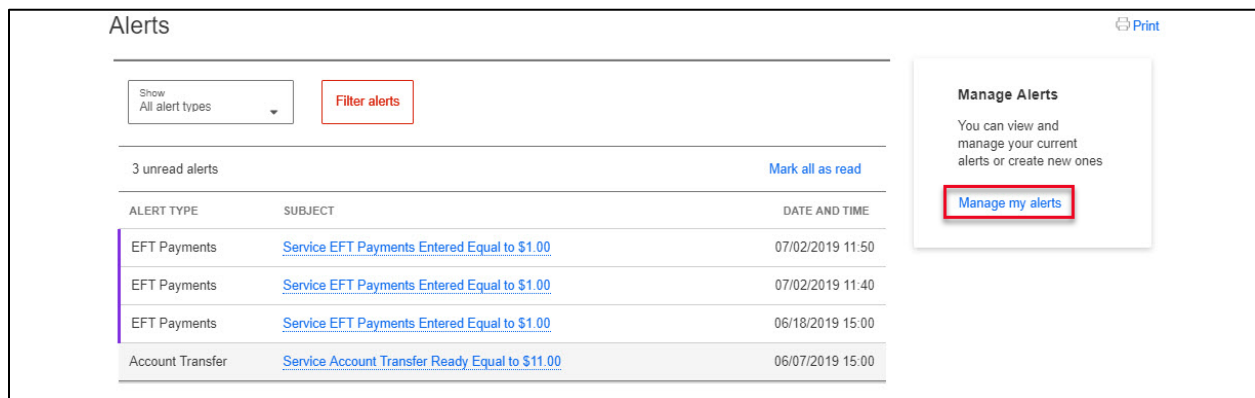
Custom alerts are user-defined and can be created according to personal preference for the following categories:

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



SETTING UP ALERTS AND EMAIL NOTIFICATIONS

To create a new alert or modify an existing one, click 'Alerts' icon from the top navigation bar and click 'Manage My Alerts' on the right.



On the Available Alerts page, you can create new alerts, search for existing alerts and modify/delete existing alerts. Note that you cannot delete standard alerts, but you can edit their email notification preferences.

To create an alert, click the 'Add New Alert' button.



Select the alert category.

The screenshot shows the 'Add New Alert' dialog box. The 'Category' dropdown menu is open, displaying the following options: 'Please select', 'Balance', 'Transaction', and 'Service'. The 'Accounts' field is empty, and the 'Selected Account IDs' field is also empty. A 'Help' link is visible in the top right corner.

Balance will let you setup alerts for a specific balance amount (less than, equal to or greater than). For example, you can create an alert to notify you when any account balance exceeds \$10,000.

Transaction will let you set criteria around specific transaction types and amounts. For example, an alert can be created to notify you when an incoming wire over \$100 is credited to a specific account.

Service will let you set up alerts related to ScotiaConnect service functions such as Wire and EFT payments.

The screenshot shows the 'Add New Alert' dialog box with the 'Transaction' category selected. The 'Transaction Type' dropdown menu is open, displaying the following options: 'Please select', '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', and 'Account Transfer'. The 'Alert at Amount' field is set to 'Equal to'. The 'Accounts' section shows a list of 'Available Account IDs' with a 'Selected Account IDs' field. The 'Save Alert' button is highlighted in red.

Select the account(s) you would like this alert to monitor by using the directional arrows.

If applicable, enter the 'Alert at Amount' and indicate whether you would like to setup email notifications. Click 'Save Alert' to finish creating the alert.

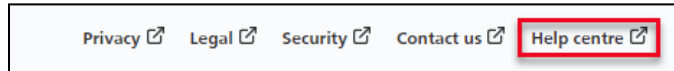
Alerts you have created will show on the 'Manage Alerts' page. You can click on the alert name hyperlink to edit the alert or put a checkmark beside the alert and click 'Delete' at the bottom right.

SAMPLE EMAIL

FOR FURTHER ASSISTANCE

Need Help?

In the footer of any page in ScotiaConnect, you will find a 'Help Center' link.



Clicking that link will take you to a resource page with documents, videos, webinars and guided tutorials. There is also a knowledge base of Frequently Asked Questions.

Global Business Payments Technical Helpdesk - Monday through Friday, 8:00 a.m. to 8:00 p.m. ET.

- 1-800-265-5613 - Toll-free number within North America
- 1-416-288-4600 - Local Toronto area customers
- 1-800-463-7777 - pour le service en français
- Email: hd.ccebs@scotiabank.com. Your email will be answered within 24-48 business hours.

If you have any questions about the content of this guide email us at:

gbp.training@scotiabank.com

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