Scotia Visa Business Card

CentreSuite
Balance and Transaction Information

Table of Contents

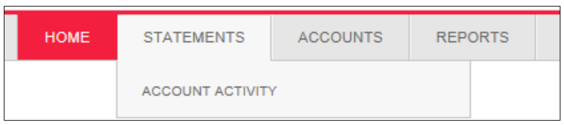
Scotiabank®

Introduction

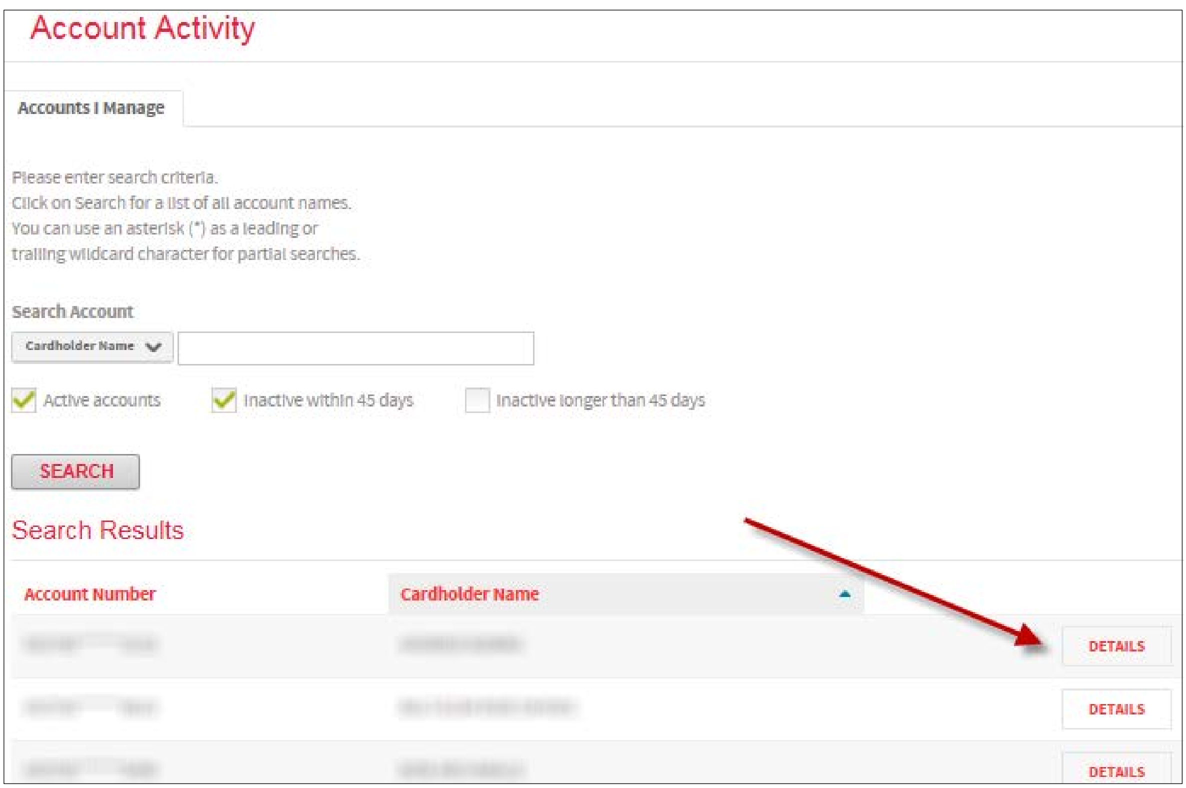
Through the CentreSuite site, you can review the balances, current authorization requests, and account activity.

Account Activity

You can review the account activity for either a single cardholder or for all cards within the program by navigating to the Account Activity page, located under the **Statements** tab.

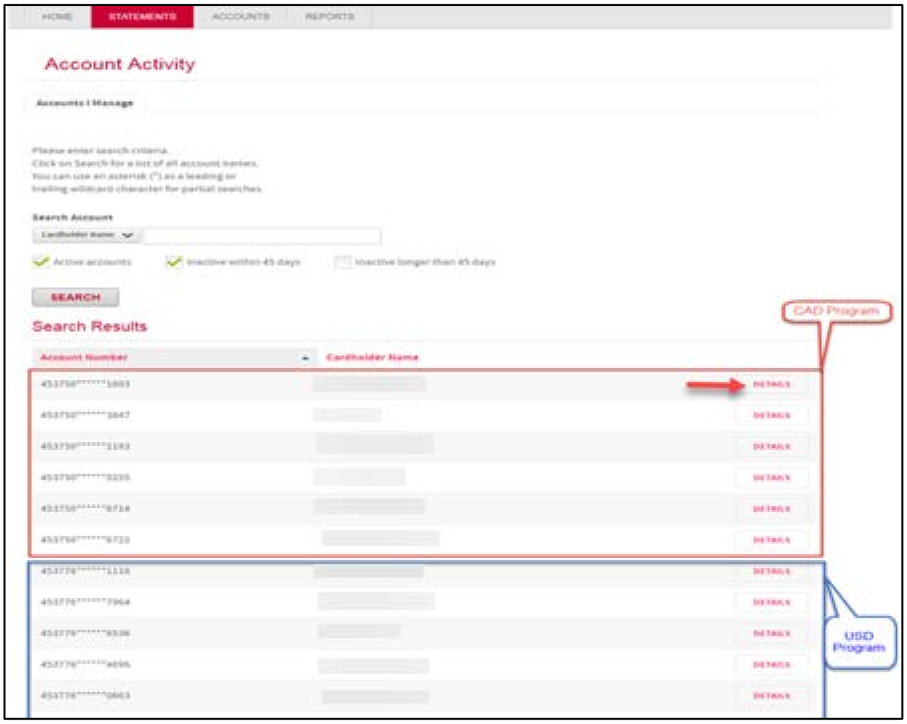


Here, you can search for a specific cardholder by name or card number or alternatively leave the search field blank and hit Search to choose from a list of all the cards within the program. The full list of cardholders will also include one in the company name, which represents the top-level program view which will allow you to view all activity across all cards. Click the 'Details' button next to the cardholder or program you wish to review.

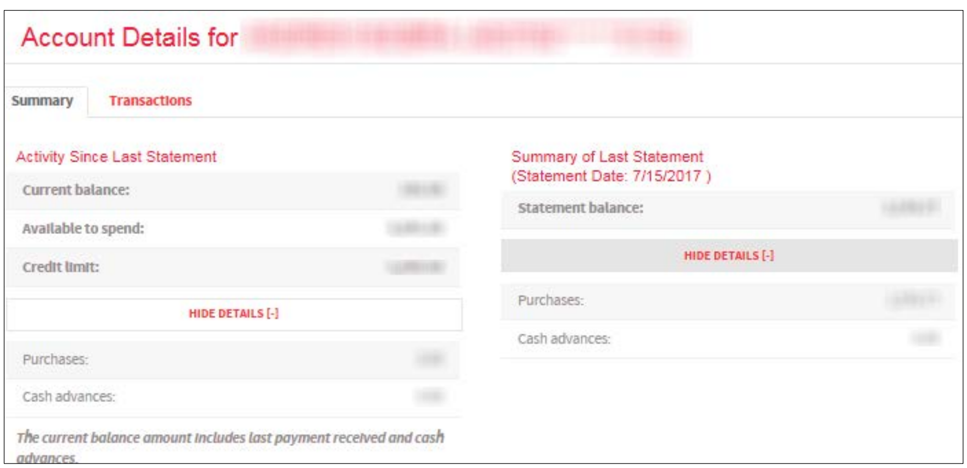


If you have multiple card programs (CAD and USD), you will be able to view your entire portfolio in CentreSuite by signing in with your CAD login details. If you aren't seeing both your CAD and USD agreements, please reach out to your Relationship Manager or the Technical Support Help Desk at 1-800-823-9653 and they will be able to link your agreements to the same login.

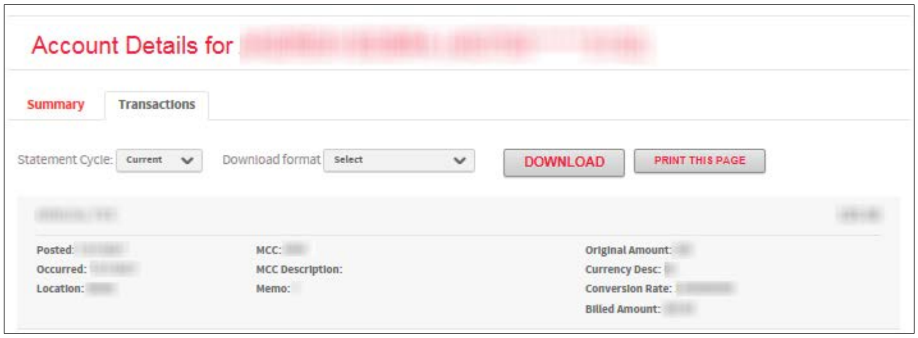
The first six numbers will confirm the card currency (453750 for CAD and 453776 for USD). Click 'Details' on the right to view the Account Details.



After click the 'Details' button, you will be presented with the Account Details – Summary tab.

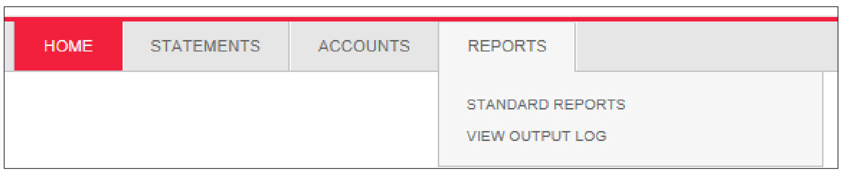


Click on the Transactions tab, and you will then be able to review transaction information for the current or past statement cycles on the CentreSuite site. You will also have the option to download or print the information.

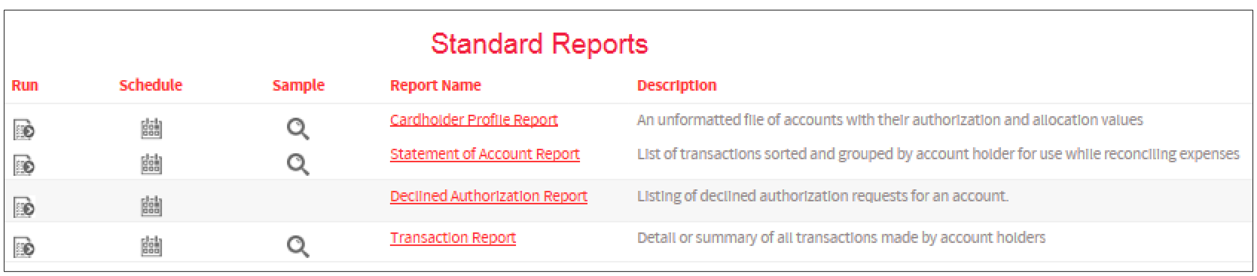


Reports

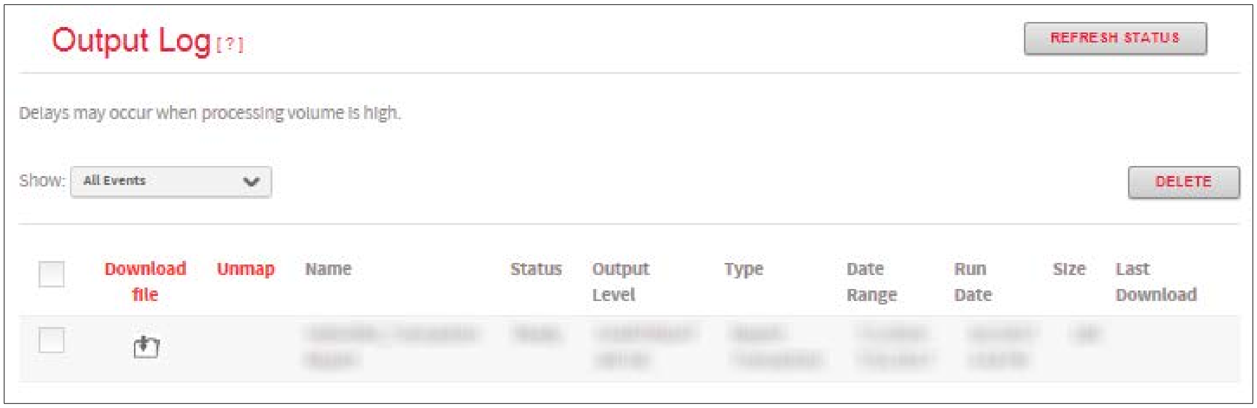
Reports can be requested by navigating to the Standard Reports page, under the **Reports** tab in CentreSuite.



Once on the Standard Reports page, locate the type of report you wish to generate. The report names and descriptions are provided on the Standard reports page, and sample reports can be viewed by clicking the magnifying glass icon to the left of the report name. Click the icon under the Run column to generate your desired report.



Once a report has been run, it will be available for download on the Output Log page, which can be accessed by clicking on View Output Log under the **Reports** tab. Reports may take some time to be produced depending on the report specifications and CentreSuite server load.



Alerts

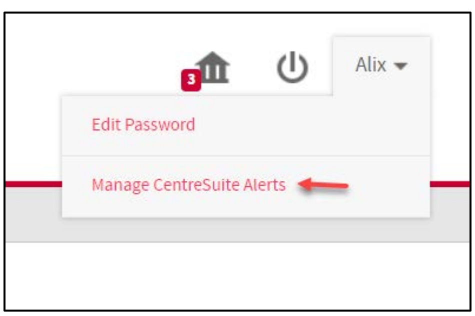
There are two alerts available for you to setup which can assist in managing your card program:

Current Balance Approaching Credit Limit: This alert notifies you when a card(s) or corporate account is reaching its limit. Input a percentage in the required field and the selected account(s) will trigger an alert when the percentage of their limit is reached or exceeded.

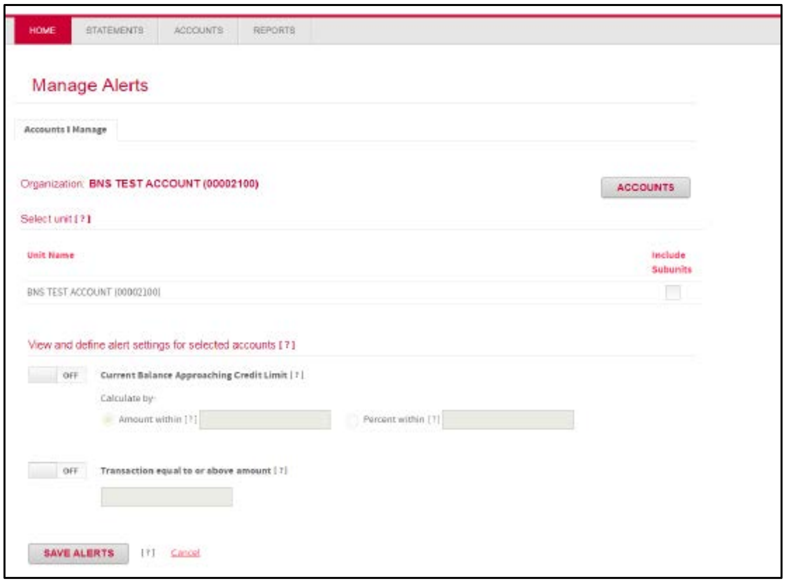
Transaction equal to / above amount: This alert can be used to notify you when a specific card has a transaction that exceeds or is equal to a certain value. If the cardholder meets or exceeds the value you indicate an alert will be generated.

Managing Alerts

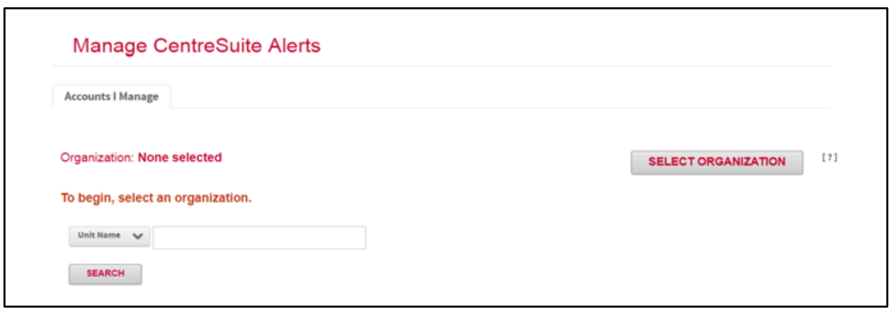
To manage your alerts go to the menu next to your name at the right hand corner of the page and select 'Manage CentreSuite Alerts'.

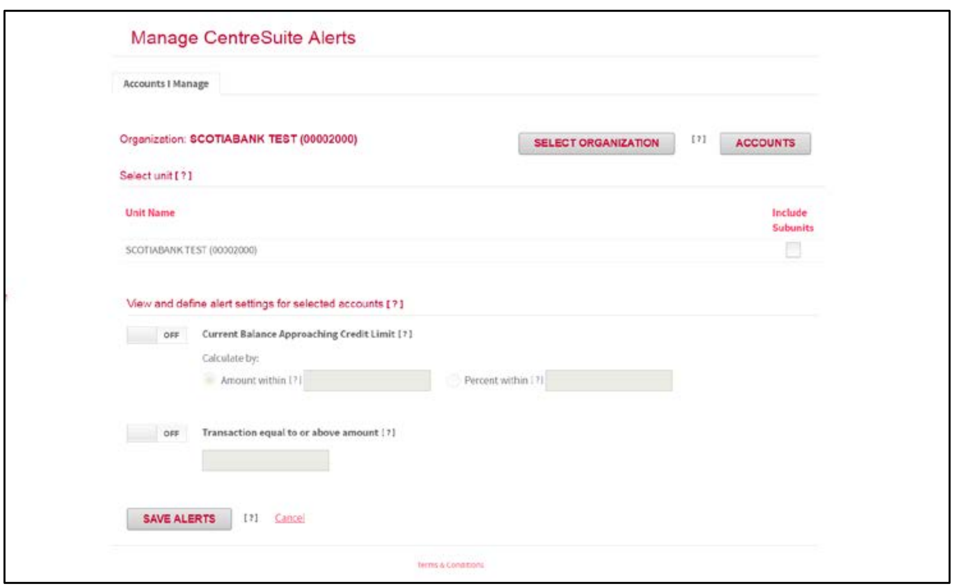


Once the page loads you will see the alerts listed with 'On/Off' toggles next to each one.



If you have CAD and USD Accounts, you will have the option to 'Select Organization' and search by the 'Unit Name' or 'Unit Number' before making changes.





If you enable Current Balance Approaching Credit Limit you will then be prompted to choose an amount within or percent within to indicate when the alert should trigger. 'Amount within' will trigger when the difference between the available credit and credit limit is equal to or less than the value you input. 'Percent within' will trigger when the available credit becomes equal to or less than the percentage of the credit limit.

If you enable Transaction equal to or above current amount you will be prompted to supply the amount at which the alert will be triggered. Once you have made your changes click 'Save Alerts' to finalize them.

Contact Us

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

- 1-888-823-9657 - Toll-free number within North America
- Email: hd.ccebs@scotiabank.com. Your email will be answered within 24-48 business hours.
- To book product training, please send an email to gbp.training@scotiabank.com