

Task	Purpose	Navigation
Adding a Bill Payment Company	Saving Bill Payment company and account information for repeat use	Payments > Bill Payments > Payee Maintenance > Add Payment Account.
Creating a Bill Payment	Paying companies that have registered as Bill Payment companies with Scotiabank	Payments > Bill Payments
Creating an Account Transfer	Moving money between your accounts on ScotiaConnect	Accounts > Transfer between Accounts
Creating a custom alert	Used to set triggers to notify you when various events occur in ScotiaConnect	Click the Alerts icon (bell) > Manage Alerts > Custom Alert
Viewing Account Details	Generating a report showing the transaction information for one or more accounts	Reporting > Account Details > Set criteria > View/Report/Export
Searching for a transaction	To find a specific transaction or group of similar transactions	Reporting > Transaction Search > Set criteria > View/Report/Export
Viewing Consolidated Balance Reports	Generating a report showing the balances for all the accounts you have access to view.	Reporting > Consolidated Balances > Set criteria > View/Report
Downloading Monthly Statements	Download a PDF of your monthly bank statement	Reporting > Account Statements > Select Month > View > Select Criteria > Download/Export All
Adding a Recipient	Saving account information for individual payments. Used for: e-Transfers, IMTs, Wires, EFTs, ACH	Overview Page > Add Recipient Icon
Creating a single payment	Using a saved recipient to create an individual payment	Overview Page > Create Payment Icon > Select Recipient
Adding a Template	Saving account information for groups of payments. Used for: EFTs, Wires, and IATs	Payments > Integrated Payments > Manage Templates > Add Template
Creating multiple Payments	Using your saved templates to make multiple payments at once	Payments > Integrated Payments > Create from Template > Search & select templates
Approving a payment	Acting as a signatory before payments are released for processing	Click on the relevant payment type on 'To Approve' section of Overview page
Submitting a payment	Releases payment for processing, required step whether approval is required or not	Click on the relevant payment type on 'To Submit' section of Overview page
Tracking a wire	Seeing whether your wire has arrived at the beneficiary bank or not.	Payment Search > Enter wire details > Track Wire