CentreSuite
Card Management

Quick Reference Guide

Scotiabank.

INTRODUCTION

One of the most important functions a coordinator performs is creating, maintaining, and closing cards for cardholders at your company. This functionality is all located through the **Manage Accounts** option under the **Accounts** tab in CentreSuite.
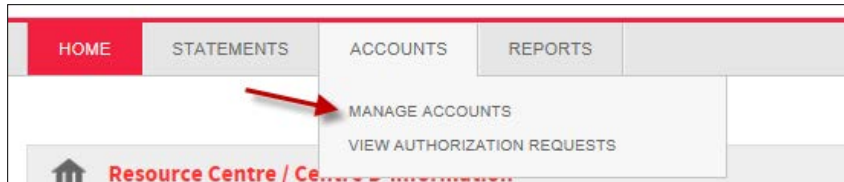
CREATE A CARD
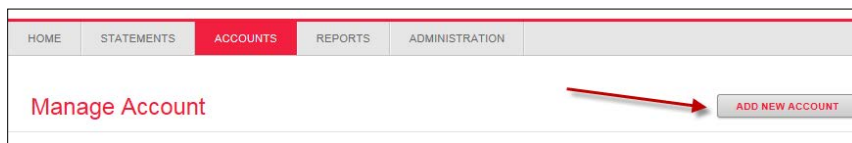
To create a new card, click on the **Accounts** tab and select Manage Accounts. Click on **Add New Account** and a blank **Account Management for New Account** form will be displayed. An example is displayed on the next page, with an explanation of the required fields.

Once all the fields have been completed, click **Submit** and the card will be delivered to the primary coordinator within the next 7-10 business days or to an alternate address provided when creating the card.

Coordinators with a single login can view their entire CentreSuite portfolio (CAD and USD) and will have the option to select the location for the **New Account** before creating a card.
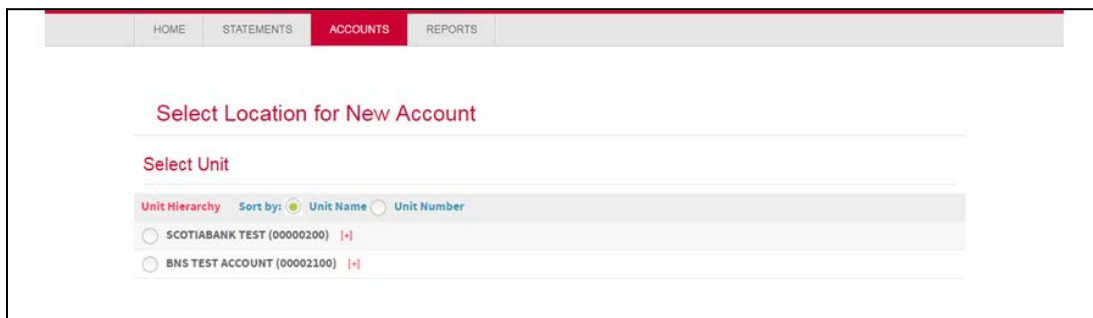
Once the location is selected, click on the **plus sign** and click **Next** to continue the setup.
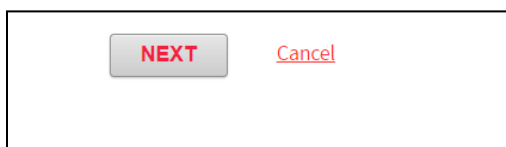
The following fields must be completed in order to successfully request a card:

Legal First Name: [?] *

Legal Middle Name: [?]

Legal Last Name: [?] *

Cardholder Name:
Cardholder Name must be 21 characters or less,and must contain * between first and last name.example: John*Doe [?] *

Company Name:
Company Name is limited to 21 characters and can only contain
the following characters A-Z 0-9
% - . / ? ^ ; = [?] *

Address Line 1: [?] *

Address Line 2: [?]

City [?] *

Province: [?] *

Postal code: [?] *

Email Address: [?] *

Work Phone: [?] *

Card Type: [?] *

Please enter EG, ES, FG, or FS. English Silver (ES); English Gold (EG); French Silver (FS); or French Gold (FG)

Employee ID: [?]

Date of Significance: [?] *

Month ⌄   Day ⌄   Year ⌄

Number of Cards to Request [?]

1 ⌄

Card Delivery [?]

Regular Mail ⌄

No fee applies for Regular Mail delivery. For more information click the above [?].

Use Shipping Address Instead

Credit Limit: [?] *

0

Cash Advance %: [?]

0

Update to Cash Advance % field is not real time. Overnight processing is required.

SUBMIT   [?]   Cancel

Legal Name: Enter the cardholder's Legal First Name, Legal Middle Name (if applicable) and Legal Last Name as they appear in any of their identification.

Cardholder Name: enter cardholder's first and last name as it should appear on card. Ensure there is an * between the first and last name with no blank spaces ie Jane*Doe. Cardholder name must be 25 characters or less and should not contain punctuation (i.e. hyphens, accents).

Company Name: enter company name as it should appear on card. Ensure there is an * at the end of the company name, i.e. ABC Company*. If left blank, the company name as provided by your relationship/account manager will be used.

Address Line 1, City, Province, Postal Code: enter cardholder's mailing address.

Email address: enter cardholder's email address.

Work phone: enter cardholder's work phone number.

Card Type: used to specify the card type (gold vs silver) and language (English vs French).

Date of Significance: enter a significant date that can easily be remembered by the cardholder. This can be any historical date (not future date) such as an anniversary or employment date. The significant date is required for card activation purposes.

Use Shipping Address Instead: Only click this hyperlink if you want to send the card(s) to an alternative address other than the default address. Enter the new address where you want the card(s) to be shipped. Please note that this is temporary and is not stored in our data base.

Card Limit: enter cardholder's credit limit.

Cash Advance %: enter 0 if cash advance is not allowed.

MODIFY A CARD

To modify a card, first you will have to search for the cardholder's account in CentreSuite. This can be done by searching by either name or card number on the **Manage Account** page.

Then from the list of search results, click the [⋯] icon under the **Details** column, at the far left of the card you wish to modify.

This will bring you to the **Account Management** page for that card, which will allow you to edit the same fields we saw on the previous page, including credit limit and name/address information for the cardholder.

CLOSE A CARD

To close a card, first you will have to search for the cardholder's account in CentreSuite. This can be done by searching by either name or card number on the **Manage Account** page.

Then from the list of search results, click the [...] icon under the **Details** column, at the far left of the card you wish to modify.

This will bring you to the **Account Management** page for that card, and at the bottom of the **Account Management** page there is a dropdown menu where you can change the card status to **Close**. If this change is made and then submitted, the card will be closed immediately.

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 and your email will be answered within 24-48 business hours.
- To access CentreSuite Guided Tutorials please refer to SVBC Resource Centre