Company Permissions

Quick Reference Guide

Scotiabank®

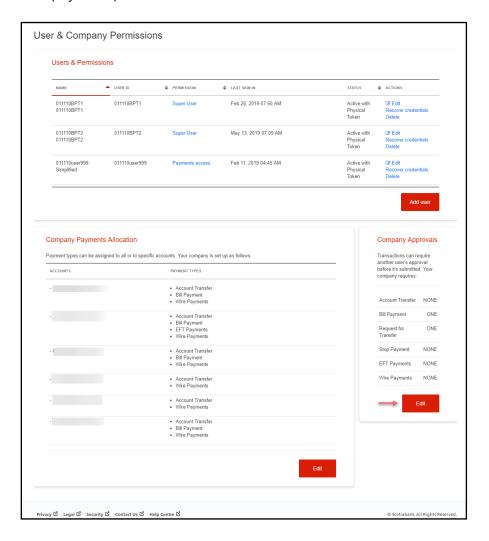Note: Only Super Users can complete the steps outlined in this guide.

COMPANY PERMISSIONS

COMPANY APPROVALS

To make changes to your approval levels for your services, go to Administration and select User & Company Permissions then click the 'Edit' icon under the Company Approvals section. You will only be able to edit the approvals if your company has more than one user with payment permissions.

You can choose to have no approvals or one approval. If you set an approval for a payment type, those payments will require approval from a second user prior to submitting them for processing. Please make all necessary changes then click 'Save & Close' to save your changes and return to the User & Company Permissions screen.
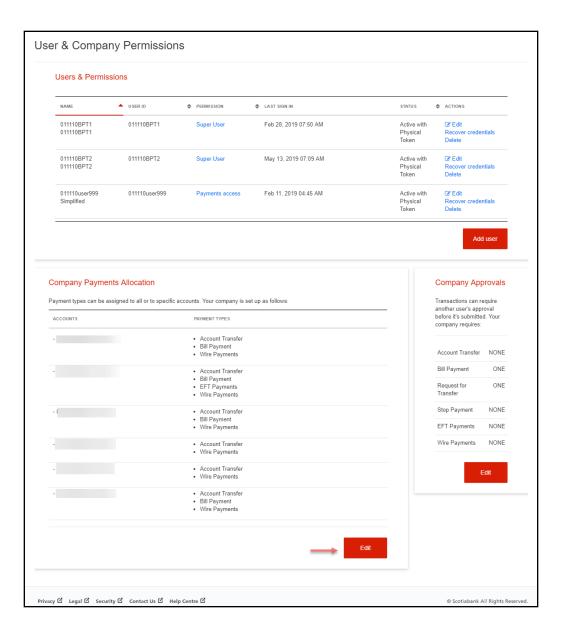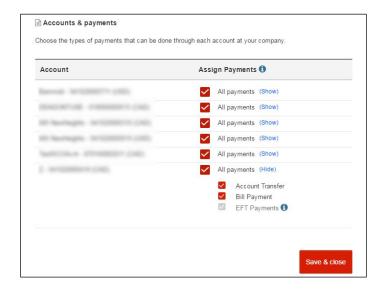
COMPANY PAYMENTS ALLOCATION

To make changes to your company's payments allocation, go to Administration and select User & Company Permissions then click the 'Edit' icon under the Company Payments Allocation section. This will allow you to control your cash flow by changing which accounts can be used with your payment services.

User & Company Permissions

Users & Permissions

NAME	USER ID	PERMISSION	LAST SIGN IN	STATUS	ACTIONS
011110BPT1 011110BPT1	011110BPT1	Super User	Feb 28, 2019 07:50 AM	Active with Physical Token	Edit Recover credentials Delete
011110BPT2 011110BPT2	011110BPT2	Super User	May 13, 2019 07:09 AM	Active with Physical Token	Edit Recover credentials Delete
011110user999 Simplified	011110user999	Payments access	Feb 11, 2019 04:45 AM	Active with Physical Token	Edit Recover credentials Delete

Add user

Company Payments Allocation

Payment types can be assigned to all or to specific accounts. Your company is set up as follows:

ACCOUNTS	PAYMENT TYPES
-	• Account Transfer • Bill Payment • Wire Payments
-	• Account Transfer • Bill Payment • EFT Payments • Wire Payments
-	• Account Transfer • Bill Payment • Wire Payments
-	• Account Transfer • Wire Payments
-	• Account Transfer • Wire Payments
-	• Account Transfer • Bill Payment • Wire Payments

Edit

Company Approvals

Transactions can require another user's approval before it's submitted. Your company requires:

Account Transfer	NONE
Bill Payment	ONE
Request for Transfer	ONE
Stop Payment	NONE
EFT Payments	NONE
Wire Payments	NONE

Edit

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To expand the payment services, click the 'Show' text link. You can select the services by placing a check box beside the ones you would like. If you do not place a check box beside a service, it means that no one from your company will be able to make that type of payment from the specified account. Click 'Save & Close' when complete to save your changes.

Please Note: If you try and remove access to a payment type from an account and there are payments still pending, you will not be allowed to do so. All payments for this account must either be completed or deleted prior to performing this step.

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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