



Novuna[®]
Business Cash Flow

Your guide to
understanding
Novuna Connect

Tomorrow. Together



Speed up credit decisions and reduce administration using Novuna Connect, granting you quicker access to funds

Novuna Connect allows you to share your key information with us with the minimum effort on your part. To enable you to get the most out of your facility, we need to understand your financial accounts and have visibility of your banking, a process which is normally labour intensive, prone to errors and a potential fraud hazard.

Novuna Connect speeds up credit decisions and reduces administration, granting you quicker access to funds. This electronic process significantly reduces fraud and helps to reduce our combined carbon footprint.

How can using Novuna Connect benefit your business?

Eliminates the need for manual data collection

Providing debtor and creditor ledgers as well as your banking information used to mean manually emailing a ream of documents. With Novuna Connect, information is available automatically, saving you time and administration expenses.

Increased data reliability

Sharing data directly from your accountancy platform and Business Bank reduces the risk of human errors which may delay your facility approval.

Increased security

Novuna Connect is much safer than sharing key company data over unsecured email or via post.

You will be asked to login and connect your accountancy platform and Business Bank, allowing you to securely share the requested financial information required for the set-up and on-going monitoring of your facility.

We communicate directly with your accounts system provider over a secure API connection, eliminating the need to store sensitive personal information or passwords.



How secure is my data?

Your data is held to the highest levels of data security, encrypted both at transit and at rest. Your data is protected to the standards required by the General Data Protection Regulation (GDPR).

Can I ask for my data to be deleted?

Yes. Under GDPR regulations individuals have the right to have their data deleted, known as “the right to be forgotten”.

However for as long as you have a facility with Novuna Business Cash Flow you will need to supply relevant information.

You can revoke access in your accounting platform at any time but if you have concerns around the use of data, please contact your Relationship Manager.

Which accountancy packages are supported?

- Sage
- Kashflow
- Xero
- MYOB
- Microsoft
- Access Dimensions
- IRISExchequer
- QuickBooks
- ClearBooks
- Pegasus
- SAP Business One
- TAS

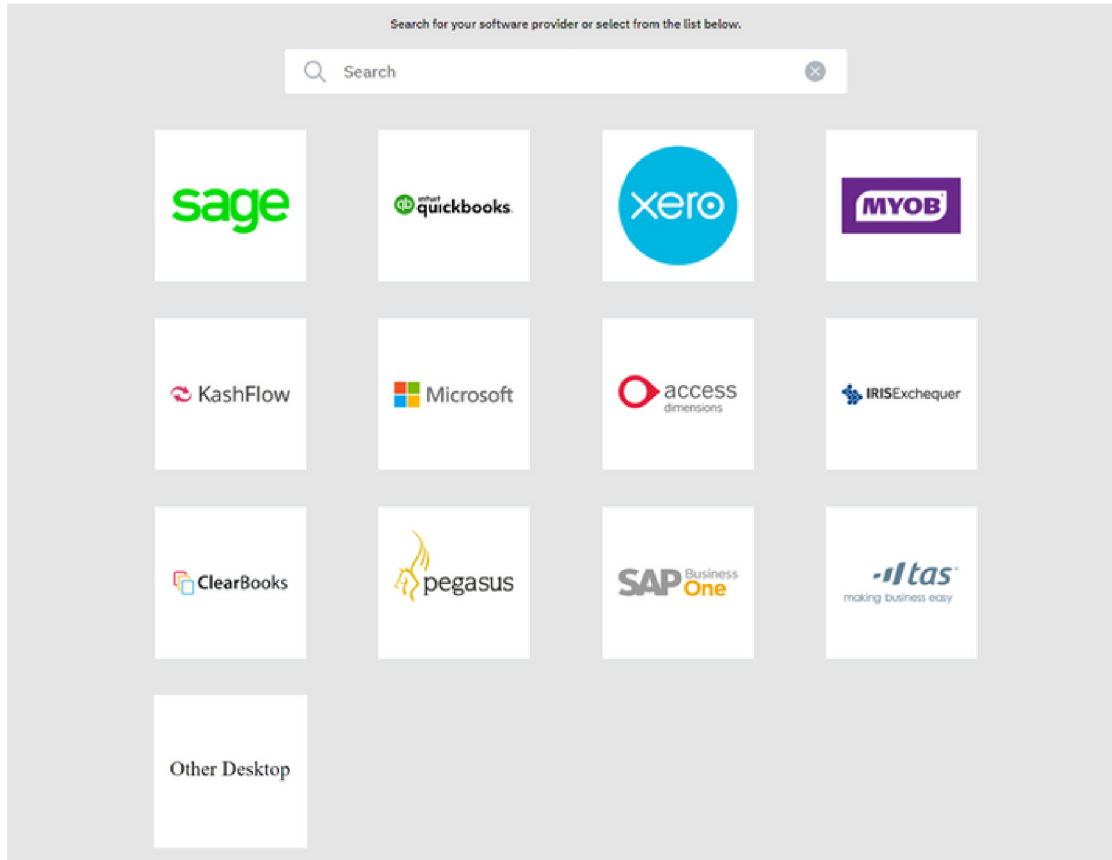
What if my accounting package isn't supported?

If your accounting package is not listed that means unfortunately it is unsupported by Novuna at this time. However please let us know which accounts package you use and we will work with our software partners to see if we can connect with it in the future. In the meantime, please continue to send your data as normal by the current method.

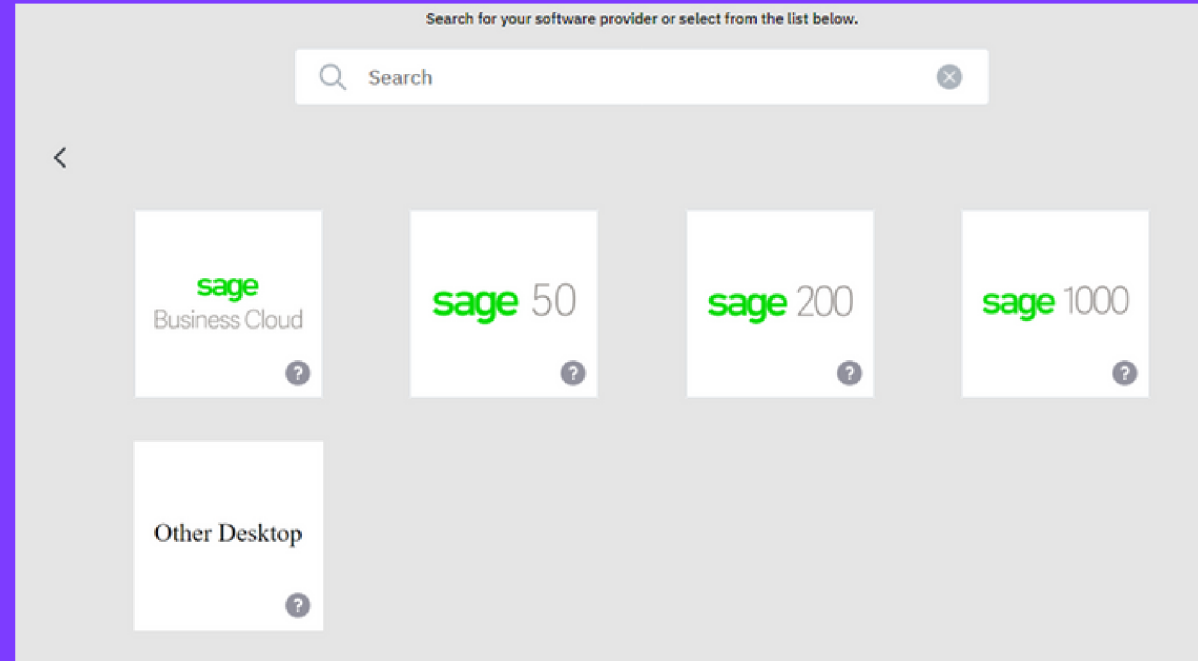
Connecting your accountancy package

You will be sent a connection email from:
donotreply@gemini-central.co.uk

Please follow the link in the email which will direct you to the below screen:

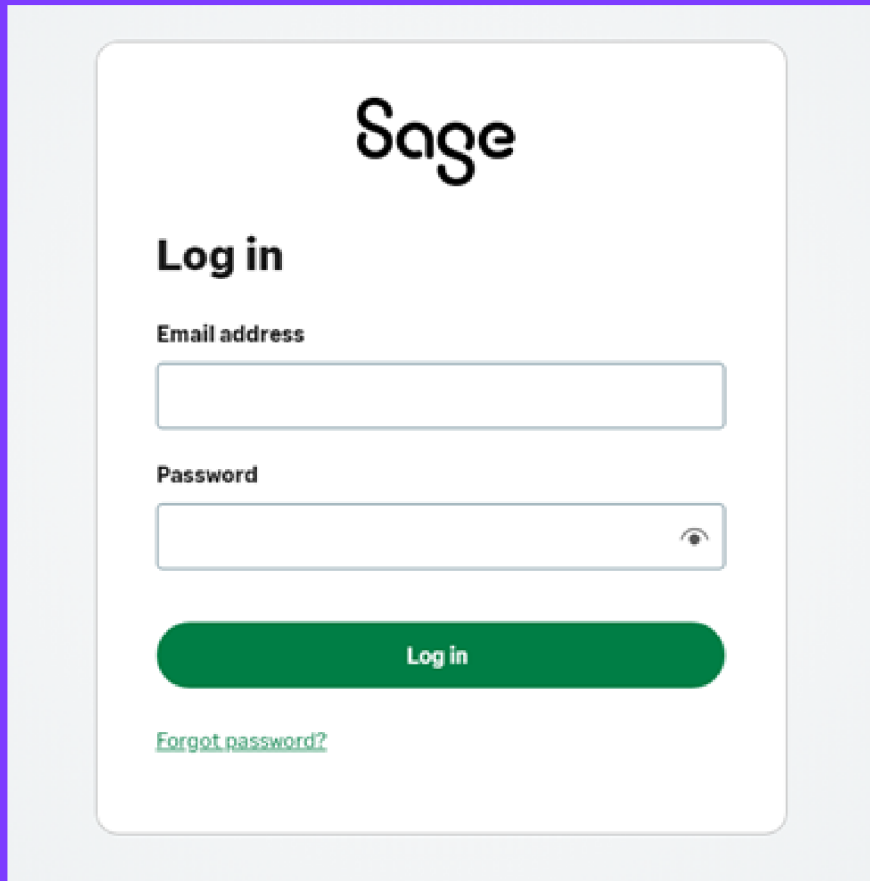


2. Select the relevant accounting package for your company.



3. Once you have selected your accounting package, you will be redirected to the login page. Please enter your log in details.

Please note if you are using a desktop version there will be no need to log in.



Sage

Log in

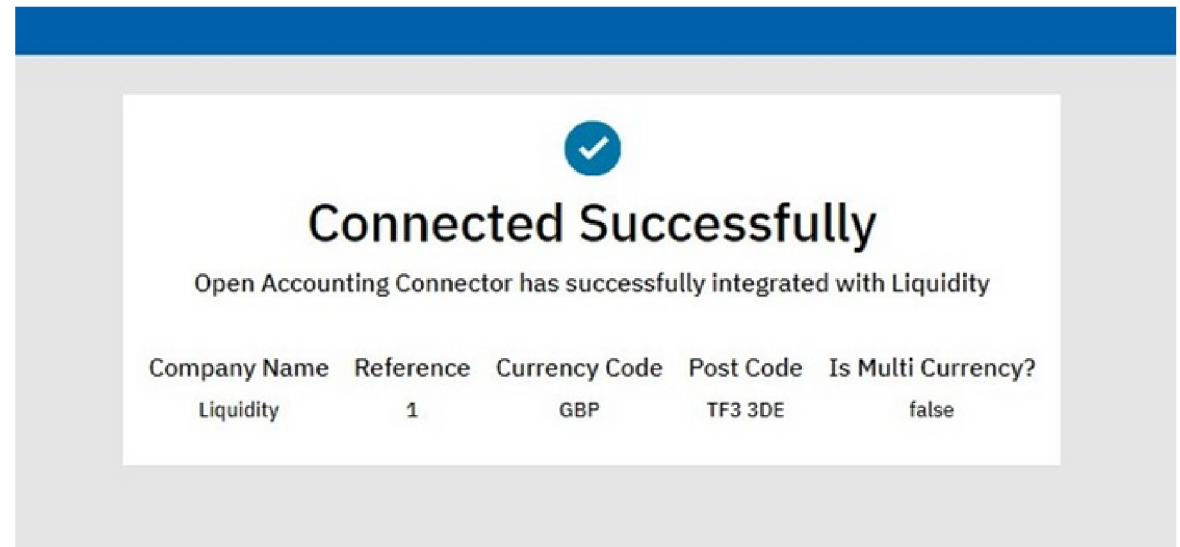
Email address


Password

[Forgot password?](#)

Log in

4. "Connected Successfully" message should now appear, meaning the connection is complete.





Connected Successfully

Open Accounting Connector has successfully integrated with Liquidity

Company Name	Reference	Currency Code	Post Code	Is Multi Currency?
Liquidity	1	GBP	TF3 3DE	false

What happens if I have problems during the connection process?

If you experience any issues while trying to connect, please follow this link and navigate to the “Troubleshoot” section: [Open Accounting Connector Help \(hpdsc.com\)](https://hpdsc.com)

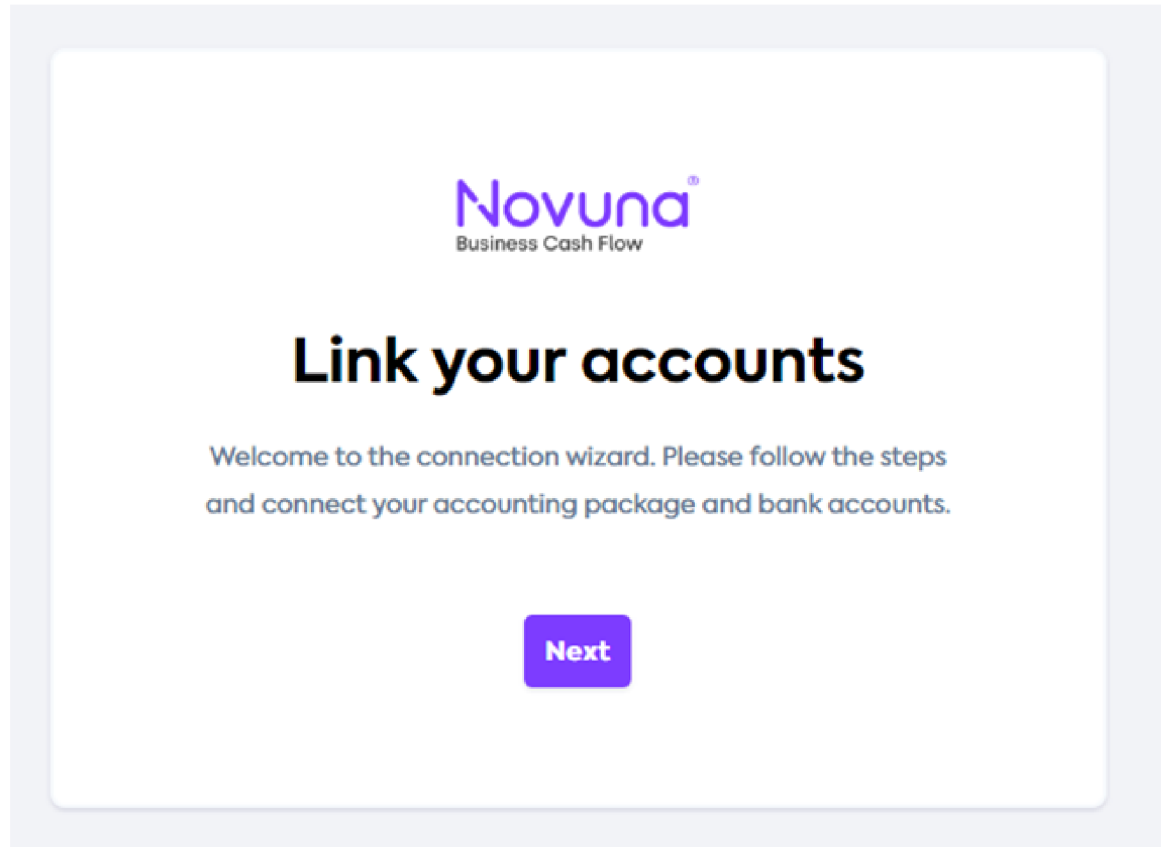
I’m connected, what happens now?

Once your accounting package has successfully connected, we will be monitoring the functionality and data for the first few months. In this time, please continue business as usual and send your data as previously agreed.

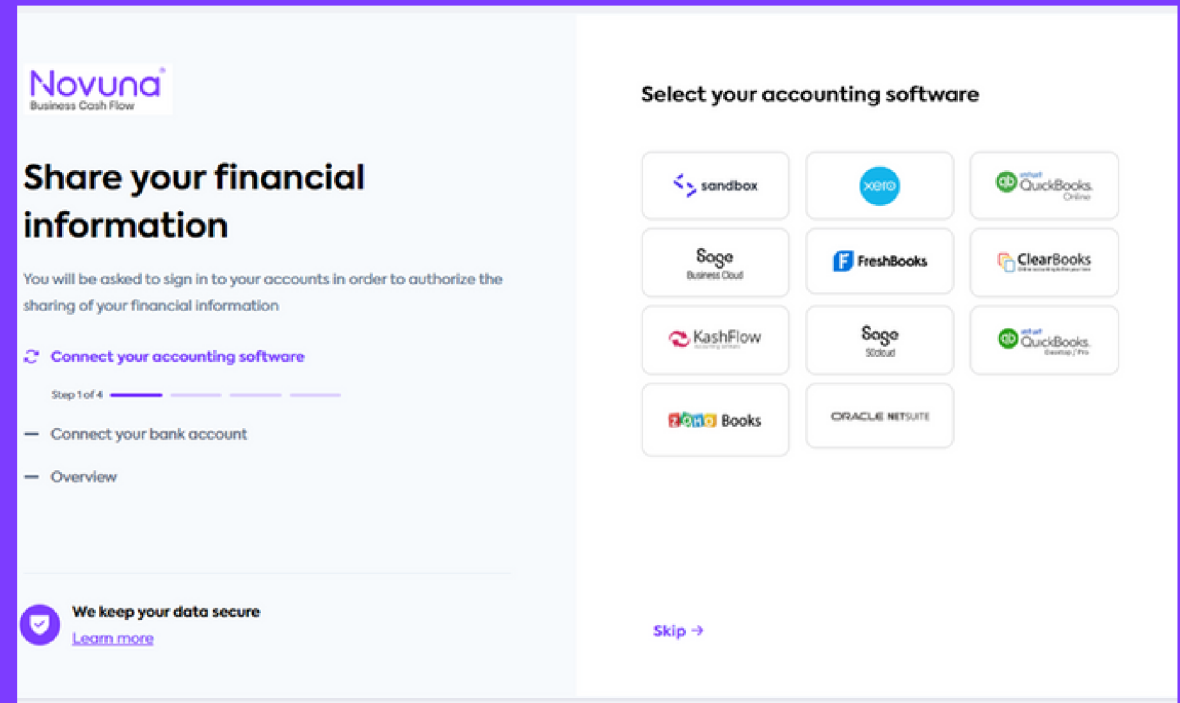


Connecting your Business Bank

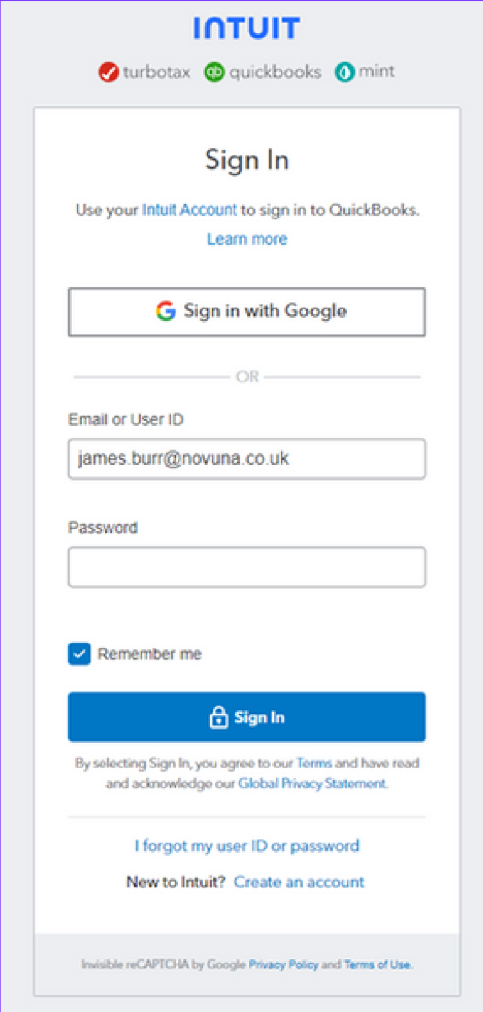
You will receive a link from your contact at Novuna Business Cash Flow, clicking this will initiate the linking process:



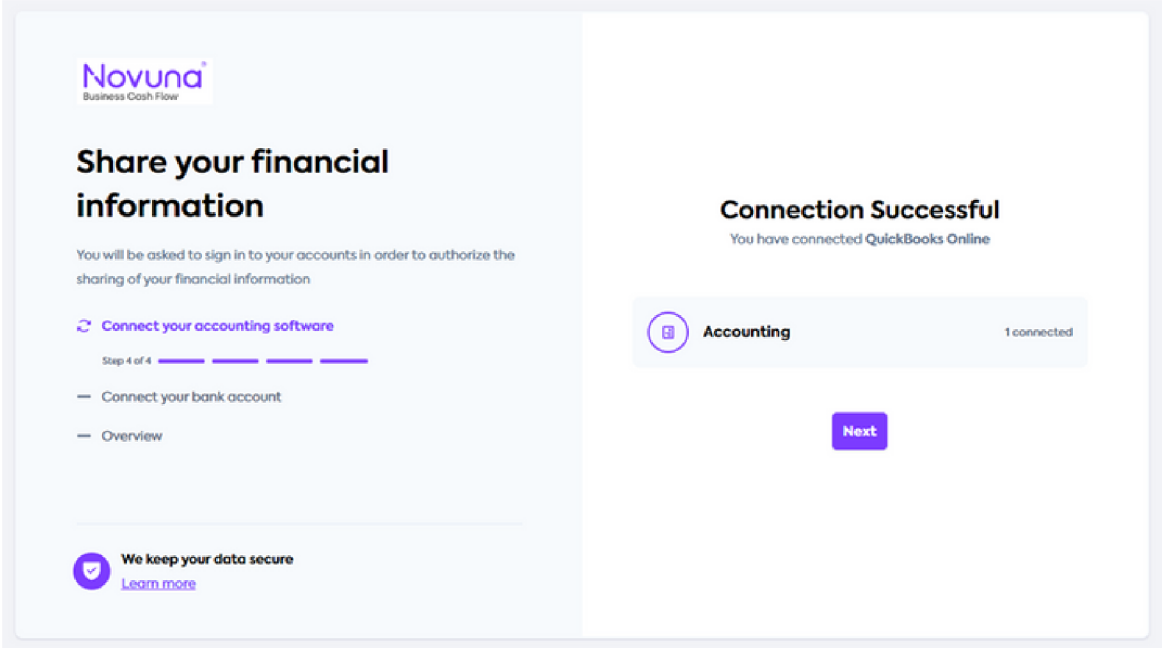
2. You'll then be asked to connect your accounts package. To do this you need to have the right permission level in your accounts system to share data; this is usually an administrator or director level of access:



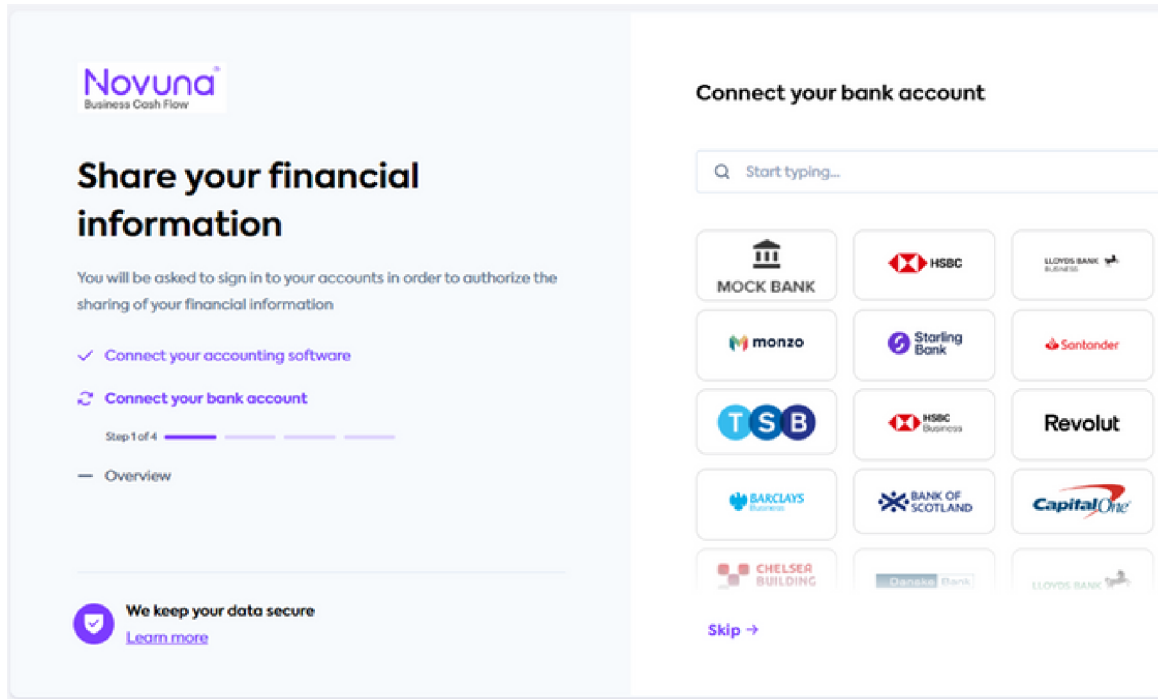
3. Through your accounts accounts system you'll be asked to sign in. Here's an example of what that looks like in Quickbooks:



3. Confirm data sharing to complete the connection. Click 'Next' to commence the banking process:

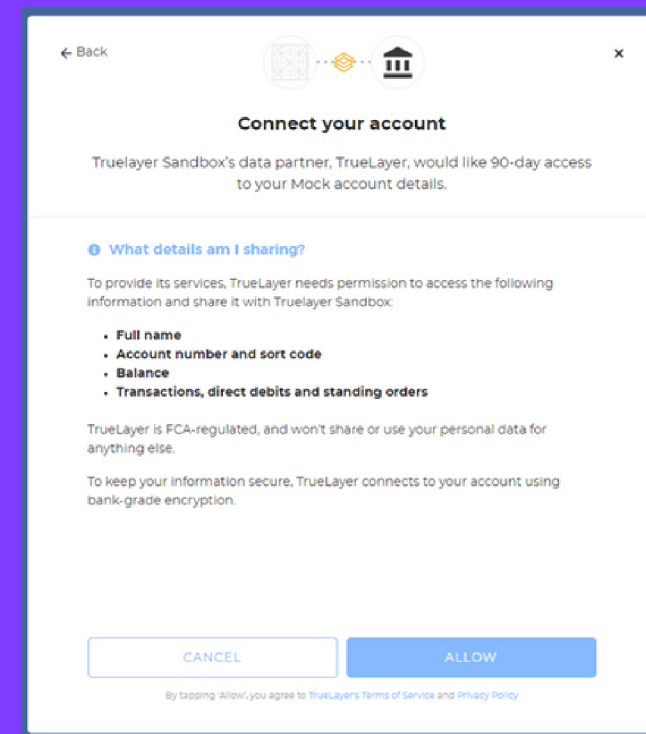


Select the provider of your business bank accounts:



3. You will be then taken to your online banking log in page (if you are doing this on a mobile device your banking app will open).

Your bank will ask you to log in and then confirm you consent to share your information with us. Here's an example of that from our 'mock' bank:



After giving your consent the process is complete!

The connection will remain in place on an ongoing basis, you can remove it at any time but please note that there is a requirement to share information to support your application and facility with Novuna Business Cash Flow.

If you wish to discuss disconnection then please speak with your contact to agree alternative methods to share the information required.

To speak to one of our friendly advisors at Novuna Business Cash Flow, please call us on Freephone:

0800 1105 005



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