

TRAINING GUIDE

Notifications

This document is intended for all new users of DNB FINSIGHT. The material provides detailed description of DNB FINSIGHT'S functionalities.

Document: **Finsight User Guide – Notifications**
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Prepared by: **The Finsight Team**

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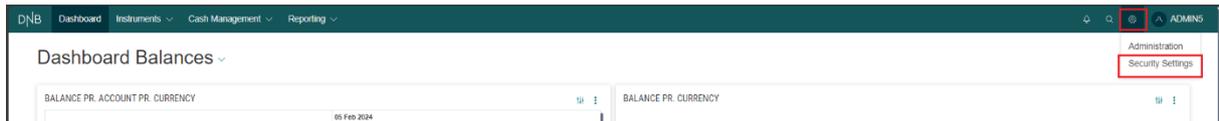
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How to setup notifications

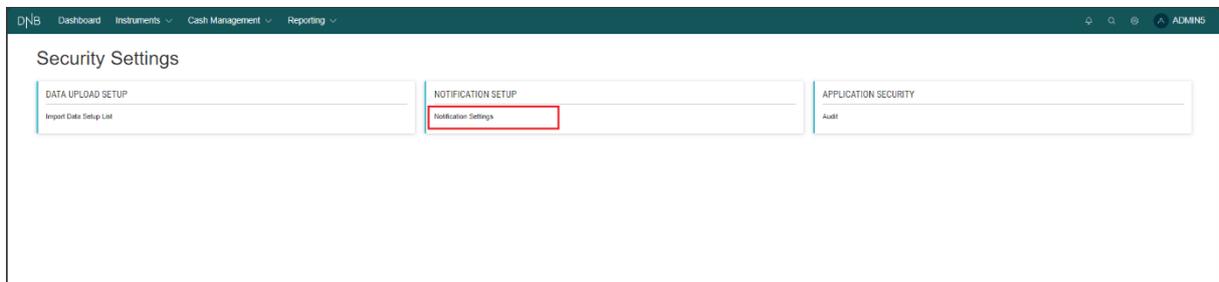
Whenever a statement and/or forecast file is successful or has failed to integrate into Finsight, the user can receive email notifications.

Following step:

STEP1 – When logged in, select the “Settings” icon on the top right corner and click on the ‘Security Settings’, to open all the security setting options available for the user



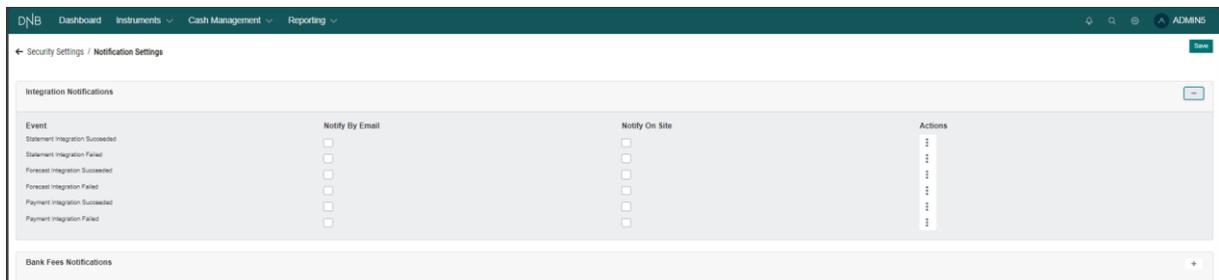
STEP2 – Click on the ‘Notification Settings’ in ‘Notification Setup’ section. It will list down all the notification options available for the user



STEP3 – Click on the ‘+’ icon in the right of the ‘Integration Notifications’ bar



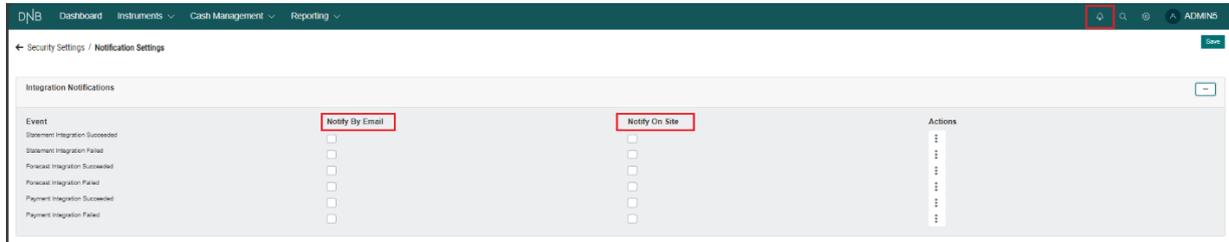
STEP4 – It will list down all the options which can be setup for notification.



There are 2 types of notifications which can be setup

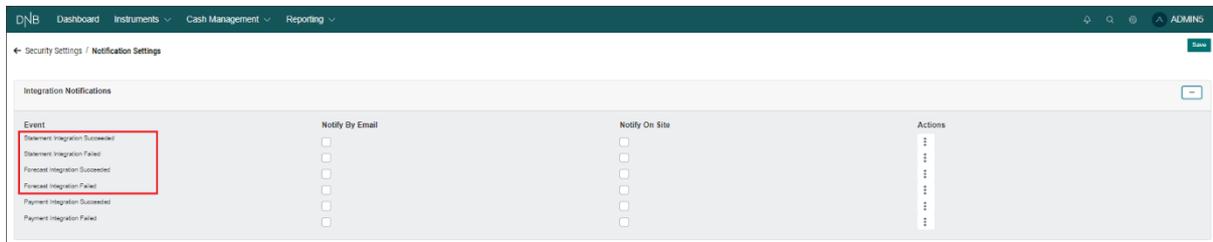
1. Notification By Email – user receives notification via email

2. Notification On Site – user receives notification in the application in bell icon on top right as highlighted below

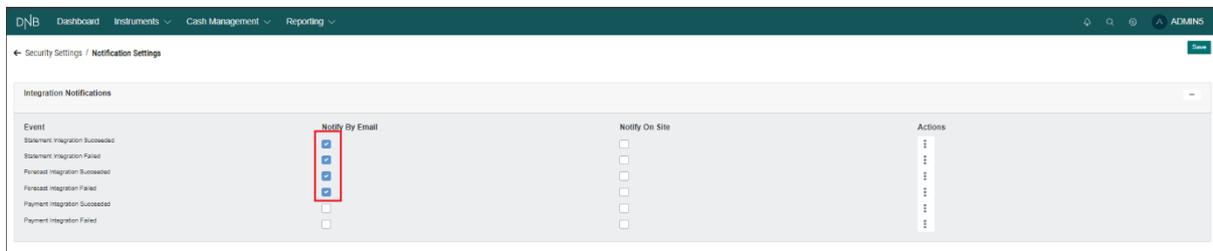


And below are the relevant events for which notification can be setup

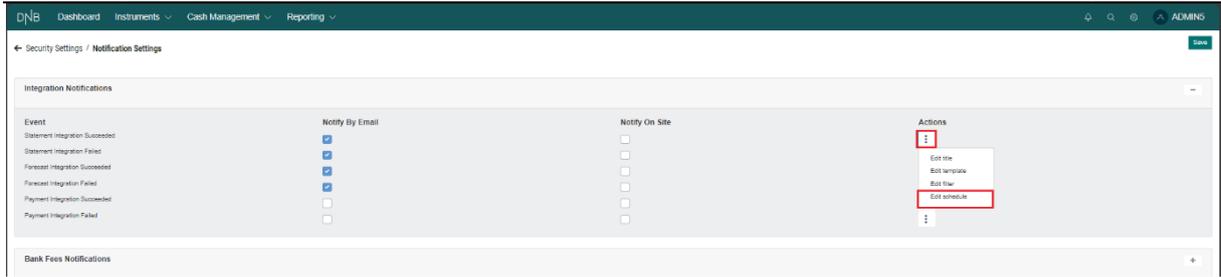
1. Statement Integration Succeeded
2. Statement Integration Failed
3. Forecast Integration Succeeded
4. Forecast Integration Failed



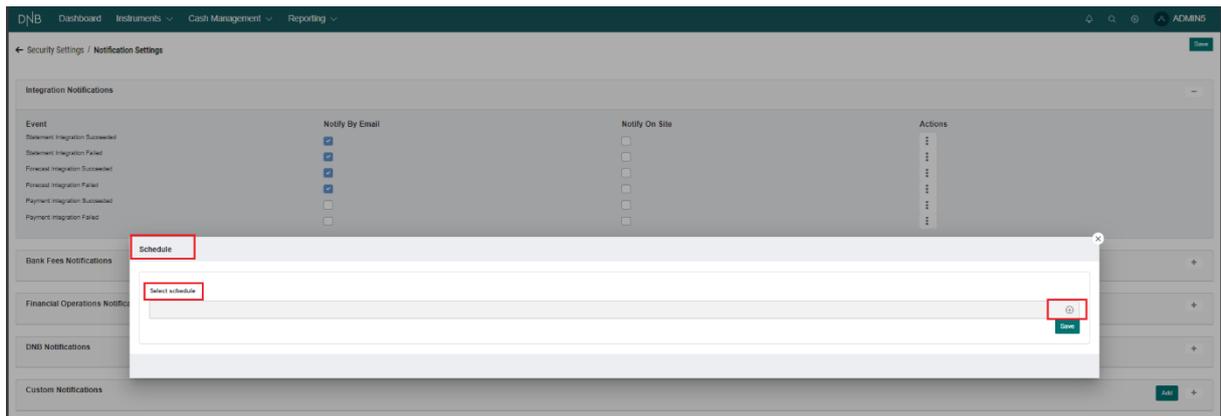
STEPS – For the events for which user wants to get notifications for, click on the checkboxes below the notification type of choice



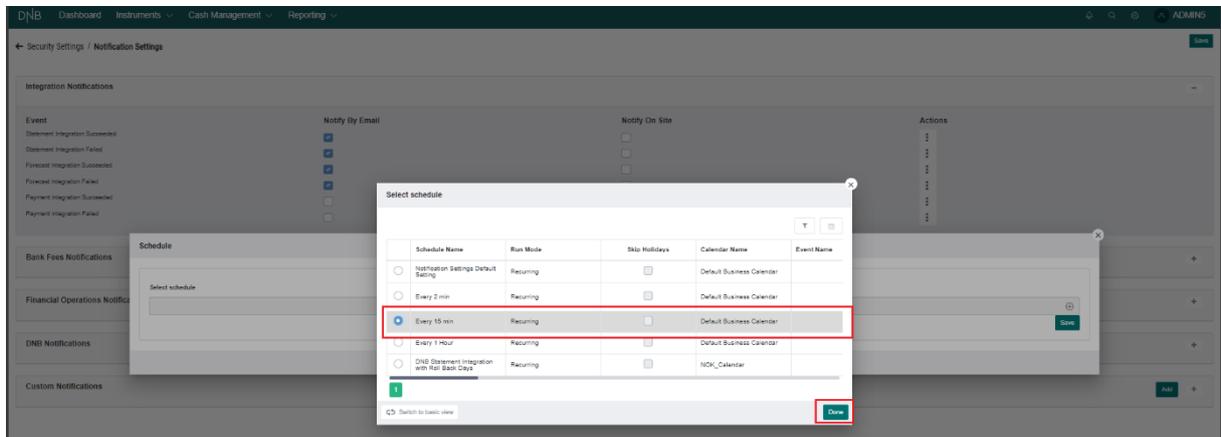
STEP6 – For each of the event for which notification is selected, press the 3 vertical dots under the 'Actions' and select 'Edit schedule'



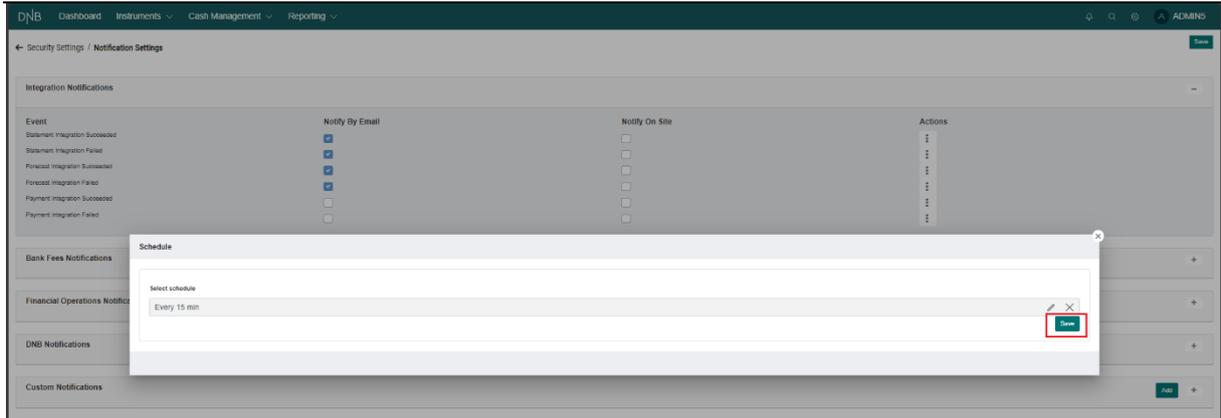
This will open a 'Schedule' pop-up to 'Select Schedule' for notification. Click on the + icon on the right to select schedule



On pressing '+ ' icon will open list of all schedules

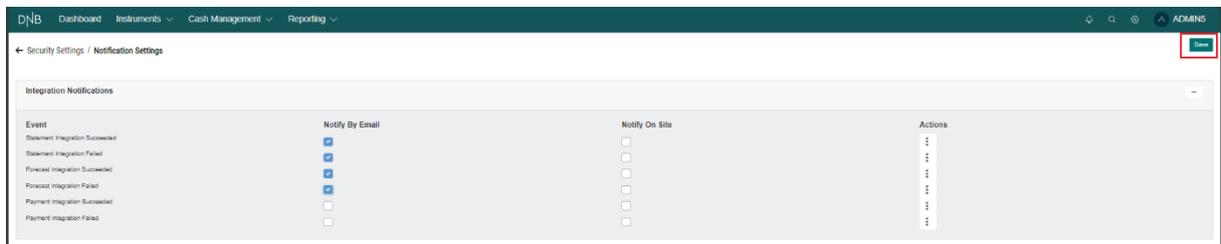


Select the 'Every 15 min' schedule and press 'Done'. The 15 min schedule will send notification within 15 minutes of the selected events.



Click on the 'Save' button to save the selected schedule.

User must select a schedule for all the events for which notification checkbox is checked and then save the notification setup using the save in top right of the screen as shown below



User will get a mail like below in case of success or failure or file integration

