

TRAINING GUIDE

Notifications

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



<i>Document:</i>	Finsight User Guide – Notifications
Version:	1.0
<i>Date:</i>	05.02.2024
<i>Prepared by:</i>	The Finsight Team

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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.

Folling 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

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

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Security Settings		
DATA UPLOAD SETUP	NOTIFICATION SETUP	APPLICATION SECURITY
Import Data Setup List	Notification Settings	Audit
l		

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

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← Security Settings / Notification Settings	Save
Integration Notifications	
Bank Fees Notifications	+
Financial Operations Notifications	+
DNB Notifications	+
Custom NetBlattons	Ad3 (*

DNB Dashboard Instruments ∨ Cash Ma	nagement \lor Reporting \lor			နာ ရ 🛞 🔿 ADMIN5
← Security Settings / Notification Settings				Save
Integration Notifications				-
Event	Notify By Email	Notify On Site	Actions	
Statement Integration Succeeded			1	
Statement Integration Failed			:	
Forecast Integration Succeeded			1	
Forecast Integration Failed			:	
Payment integration Succeeded			1	
Payment Integration Failed			1	
Bank Fees Notifications				

There are 2 types of notifications which can be setup

1. Notification By Email – user receives notification via email



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2.	Notifi	cation On Site – user receives notification in th	e application in bell icon on top right as

highlighted below

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← Security Settings / Notification Settings				Save
Integration Notifications				
integration Notifications				-
Event	Notify By Email	Notify On Site	Actions	
Statement Integration Succeeded			:	
Statement Integration Failed			:	
Forecast Integration Succeeded			:	
Forecast Integration Failed			1	
Payment Integration Succeeded			1	
Payment Integration Failed			1	

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

DNB Dashboard Instruments \lor Cash Mar	nagement V Reporting V			a c 💿 🔿 Admins
← Security Settings / Notification Settings				Save
Integration Notifications				-
Event	Notify By Email	Notify On Site	Actions	
Statement Integration Succeeded			:	
Statement Integration Failed			:	
Forecast Integration Succeeded			:	
Forecast Integration Failed			:	
Payment Integration Succeeded			:	
Payment Integration Failed			:	

STEP5 – For the events for which user wants to get notifications for, click on the checkboxes below the notification type of choice

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← Security Settings / Notification Settings				Save
Integration Notifications				-
Event	Notify By Email	Notify On Site	Actions	
Statement Integration Succeeded	0		1	
Statement Integration Failed	0		:	
Forecast Integration Succeeded				
Forecast Integration Failed			:	
Payment integration Succeeded				
Payment Integration Failed			1	

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

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Security Settings / Notification Settings				534
Integration Notifications				-
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Bank Fees Notifications				

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

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← Security Settings / Notification Settings				Save
Integration Notifications				-
Event Balanner Hagvalon Ruise Balanner Hagvalon Ruise Forseat Hagvalon Ruise Prevast Hagvalon Ruise Paymet Hagvalon Ruise Paymet Hagvalon Ruise	Notify By Email	Notify Dn Site	Actions E E E E E E E E	
Bank Fees Notifications				*
Financial Operations Notifice	OHBUM			O + Save
DNB Notifications				*
Custom Notifications				Add +

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

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← Security Settings / Notification Settings					5.00
Integration Notifications					
Event	Notify By Email	Notify On Site		Actions	
Statement Integration Succeeded				1	
Statement Integration Failed				1	
Forecast imagration Succeeded				1	
Porecest Integration Pieled	Select schedule			*	
Payment integration Failed					
			τ 🗉	-	
Schedule Bank Fees Notifications	Schedule Name	Run Mode Skip Holidays	Calendar Name Event Name		
	Notification Settings Default Setting	Resurring	Default Business Calendar		
Select schedule Financial Operations Notific:	O Every 2 min	Recurring	Default Business Calendar		•
	O Every 15 min	Resurring	Default Business Calendar	s	
DNB Notifications	Every 1 Hour	Recurring	Default Business Calendar	-	
	ONB Statement Integration with Rell Back Days	Recurring	NOK_Calendar		
Custom Notifications	1				Aar 🖝
	CD Switch to basic view		D-0		

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



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DNB Dashboard Instruments	\sim Cash Management \sim Reporting \sim			ନ୍ଦ୍ର 🔿 ADMIN5
Security Settings / Notification Settings				200
Integration Notifications				-
Event Statement Interation Succeeded	Notify By Email	Notify On Site	Actions	
Statement Integration Failed	2 7		:	
Forecast Integration Succeeded			:	
Forecast Integration Failed				
Payment Integration Succeeded	-			
Payment Integration Failed			i	
Bank Fees Notifications	•			*
Financial Operations Notifice	schedule ry 15 min		/	× +
			3	
DNB Notifications				+
Custom Notifications				
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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

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← Security Settings / Notification Settings				Save
Integration Notifications				
Event	Notify By Email	Notify On Site	Actions	
Statement Integration Succeeded				
Statement Integration Failed			1	
Forecast Integration Succeeded			:	
Forecast Integration Failed			1	
Payment Integration Succeeded			1	
Payment Integration Failed			1	

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

Integratedfiles Monday, 05 February 2024 Finsight@dnb.no 50 Cick here to download patture. To help proted your privacy, Outlook prevented automatic download of some pattures in this message.	※ 今 Reply 적 Reply All → Fernard 愛 ···· Man 05-42-2021 11-46
Bank Statement File Integrated Successfully:	
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