

Quick Reference Guide

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# Required Notifications

**JHA** Treasury Management™

*Last Updated: January 11, 2021*

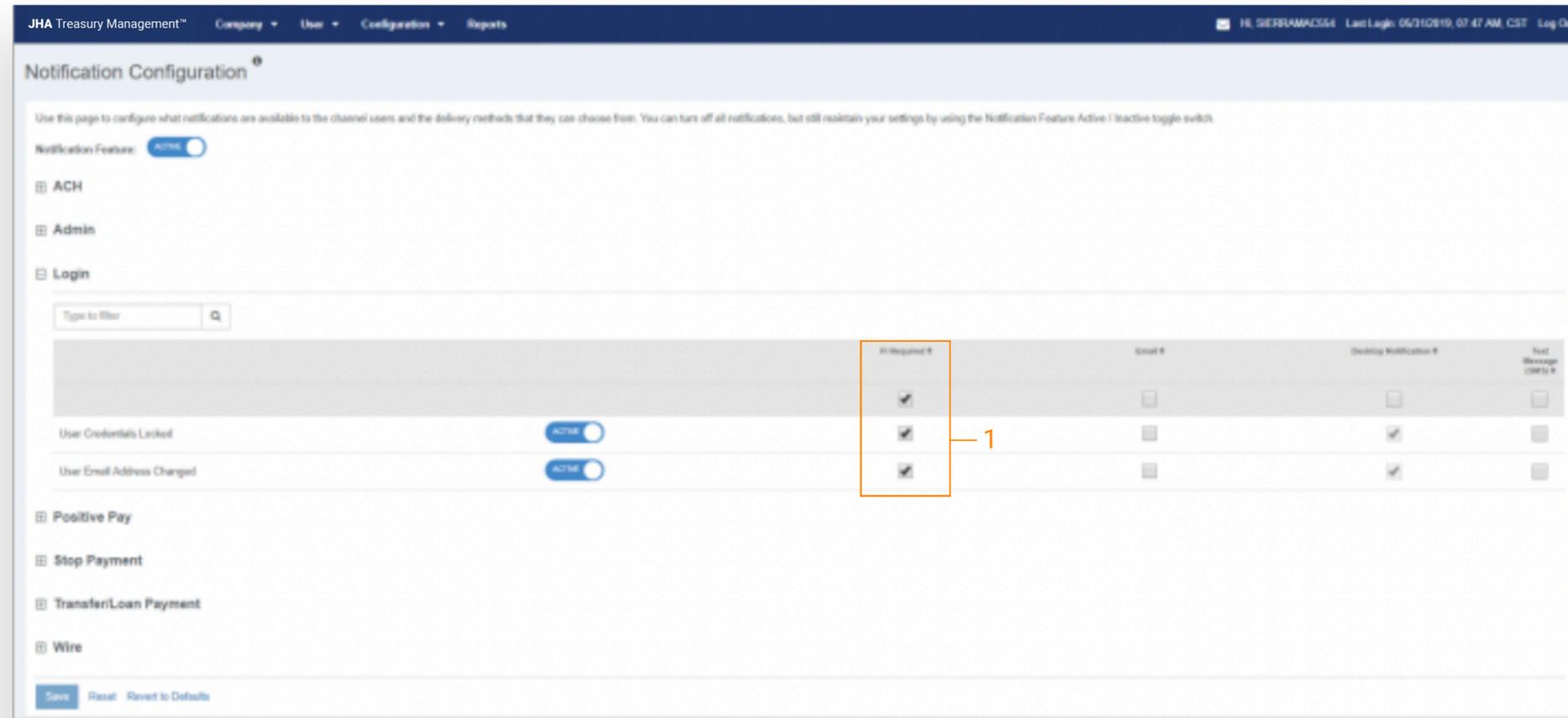
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## Required Notifications

**Overview:** JHA Treasury Management™ offers a comprehensive set of notifications ranging from login to various payment options. Required Notifications is a configuration financial institutions can establish that forces channel users to receive selected notifications.

# Required Notifications

## Back Office FI Configuration



Navigate to Back Office > Configuration > Notification Configuration

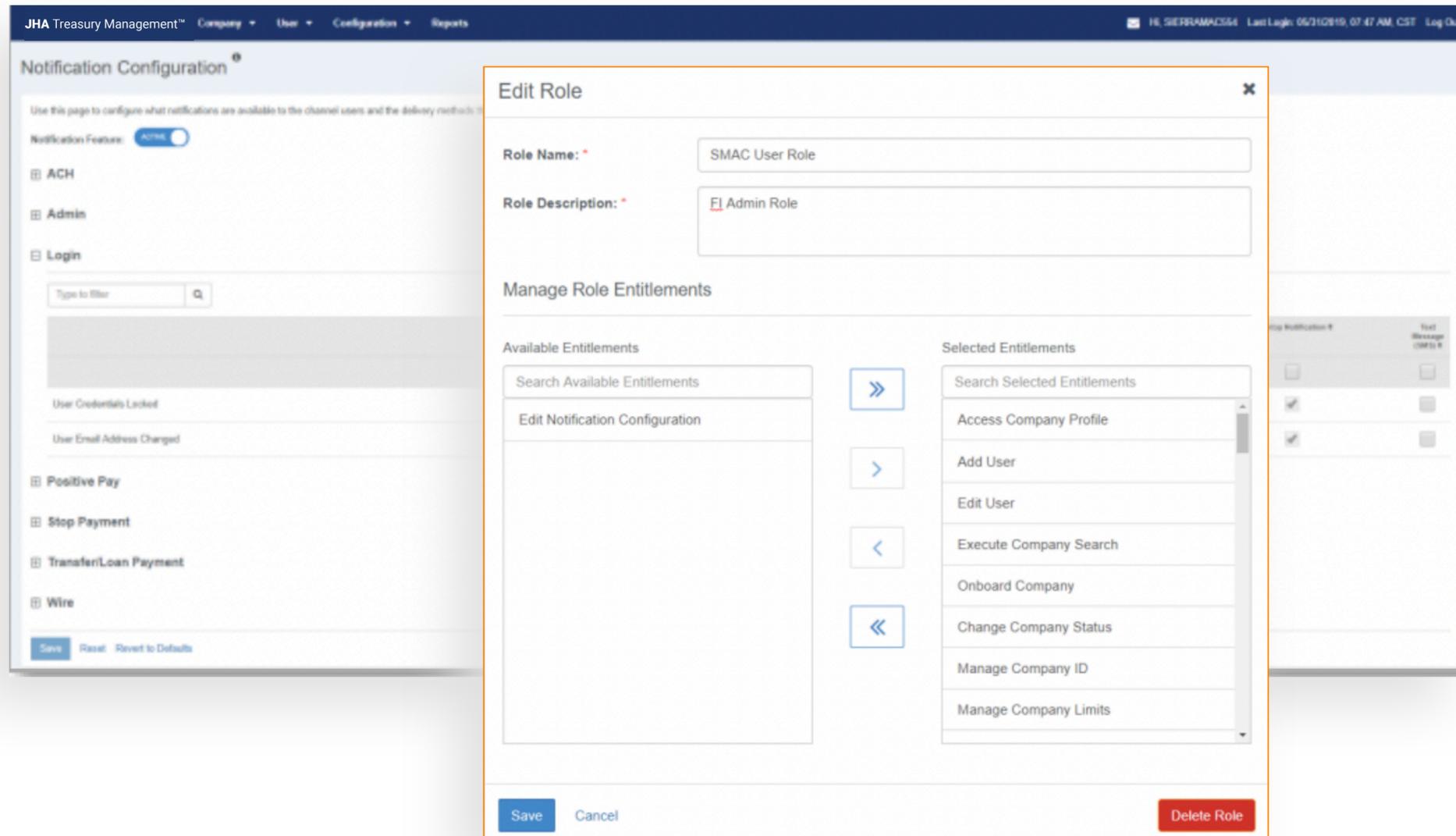
**FI Required Column:**

1. A new column labeled 'FI Required' will be present within the Notification Configuration
2. Selecting FI Required will automatically select the Desktop Notification
  - a. Desktop Notification selection cannot be disabled
3. FI User may select Email and/or Text Notification to be required

**Note:** If FI Required is enabled and with each delivery method selected, the customer will automatically be enrolled in that notification for the chosen method(s). If a notification is set to FI Required, and a delivery method is removed, that delivery method will not be enabled for enrollment by the customer.

# Required Notifications

## Edit User Role



Navigate to Back Office > Users > User Roles > Add/Edit Role

**Edit Notification Configuration Entitlement:**

1. A new entitlement labeled 'Edit Notification Configuration' has been added
  - a. All User Roles that presently have authority to edit the Notification Configuration will need to have this entitlement added
2. Without this entitlement the FI User cannot update the Notification Configuration

**Note:** The username and RDC ID must be entered with the same name.

# Required Notifications

## Channel Notification Configuration

The screenshot displays the 'Channel Notification Configuration' page in the YourFi system. The page includes a navigation bar with 'DASHBOARD', 'ACCOUNTS', 'PAYMENTS', 'RECEIVABLES', 'REPORTING', and 'ADMIN'. Below the navigation bar, there are sections for 'ACH', 'Admin', and 'Login'. The main content area features a table with the following columns: 'FI Required', 'Email', 'Desktop Notification', and 'Text Message (SMS)'. Two rows are listed: 'User Credentials Locked' and 'User Email Address Changed'. The 'FI Required' column has checkmarks for both rows. The 'Email', 'Desktop Notification', and 'Text Message (SMS)' columns have checkboxes, some of which are checked. A 'Submit' button is located at the bottom left of the table area.

	FI Required	Email	Desktop Notification	Text Message (SMS)
User Credentials Locked	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User Email Address Changed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### FI Required Column:

1. A new column labeled 'FI Required' will be present within the Notification Setup
2. Desktop Notification and any additional delivery methods selected in Back Office Notification Configuration will be selected and disabled in the setup
  - a. Customers cannot disable an FI Required notification or the selected delivery method.