ACCESS JFG

Client Learning Journey

This Client Learning Journey provides a detailed insight into the experience of AccessJFG. To ensure a smooth migration, please review these guides and videos under "Reference Material" on the Client Resources site before November 17th.

Required for All Users

- ☐ First Time Login for Converting Users
- ☐ AccessJFG Overview video
- ☐ Navigating the Home Page, within Accounts, and Sending Secure Messages

Additional Items Required for ACH and/or Wire Users

- ☐ ACH Transactions
- ☐ ACH Pass-Thru
- ☐ Wire Payments
- ☐ ACH or Wire Payments Using Templates
- ☐ Approving ACH & Wire Transactions
- ☐ Managing ACH & Wire Recipients

Reference Guides for All Users

- ☐ Frequently Asked Questions
- ☐ Information Reporting
- ☐ Transferring Funds
- ☐ Alerts
- ☐ Statements
- ☐ Updating Password & Secure Access Phone Numbers
- ☐ General Guides
  - o Check Reorder, Stop Payments, Account Labels, etc.