Corporate 360 User Guide

Oracle Banking Branch

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Corporate 360 User Guide

Oracle Financial Services Software Limited
Oracle Park
Off Western Express Highway
Goregaon (East)
Mumbai, Maharashtra 400 063
India

Worldwide Inquiries:

Phone: +91 22 6718 3000
Fax: +91 22 6718 3001
https://www.oracle.com/industries/financial-services/index.html

Contents

1 Preface

1.1 Introduction

This guide provides detailed information about the Corporate 360 feature.

1.2 Audience

This manual is for the Relationship Managers in Corporate division of the bank.

1.3 Document Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

1.4 List of Topics

This guide is organized into following topics:

Table 1: List of Topics

Topic	Description
Corporate 360	This topic provides an overview of the Corporate 360 feature and covers the actions that can be performed in Corporate 360.
List Of Menus	This topic displays the list of main screens in the document along with its reference.

1.5 Related Documents

1. Getting Started User Guide

1.6 Symbols and Icons

The following symbols/icons are used in this guide:

Table 2: Symbols and Icons

Symbol	Function
→	Represents Results
	Filter the records in expanded view
	Minimize
	Maximize
	Close

2 Corporate 360

2.1 Overview

Corporate 360 is an essential feature, which is designed to simplify the work of Relationship Managers (RM) in the bank and save a significant amount of time. The customer-specific information displayed in Corporate 360 enables the RM to stay up to date about their customers and perform actions that have strict deadlines.

Some of the most required information displayed in Corporate 360 are:

- **Customer Demographics**

  The following table describes the different sections in the **Customer Demographics** page.

  Table 3: Customer Demographic Sections

Sections	Description
Demographic Details	Basic demographic information about the customer
Stakeholders	The key stakeholders for the business
Financial Profile	Financial details for the business
Industry wise presence	Different industry sectors that the business caters to
Balance Sheet	Balance sheet details for the business
Country Wise Presence	List of countries where the business is operational
Subsidiaries	A view of the corporate's business hierarchy
Rating	Credit ratings for Corporate provided by rating agencies/internal rating provided by the Bank

- **Portfolio** across all the products subscribed by the customer
- **Actions** of pending activities

- **Sales Opportunity** for automatic debit of loans received by the customer
- **Service Requests** raised by the customer that are yet to be addressed
- **My Diary** – A to do list to plan and track the activities for relationship Manager

2.2 Get Started

Corporate 360 enables the RM to have a consolidate view of all the necessary information about the corporate with an option to drill down into the specific product dashboards for details of the customer's portfolio. The details displayed in Corporate 360 are described in the following sub-sections:

- 2.2.1 Customer Demographic
- 2.2.2 Portfolio
- 2.2.3 Actions
- 2.2.4 Sales Opportunities
- 2.2.5 Service Requests
- 2.2.6 My Diary

To view the customer details, perform the following steps:

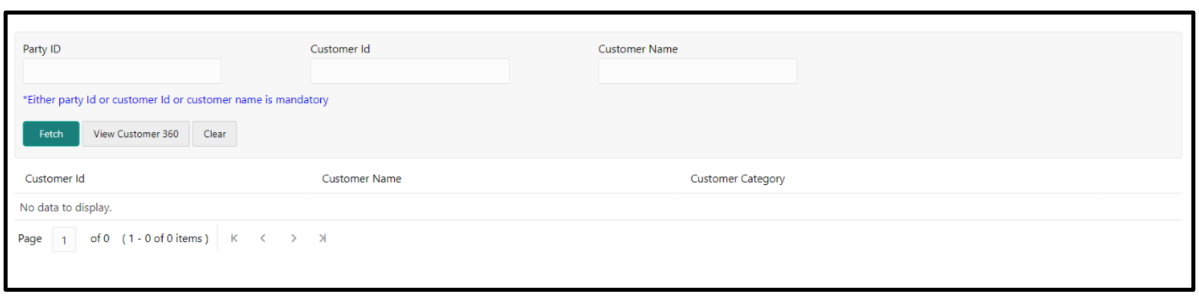
1. Login to the application.

   → The system displays the **Home** page.

2. From the **Home** page, click **Party Services**. Under **Party Services**, click **Corporate** – **Search**.

   → The system displays the **Customer Search** screen.

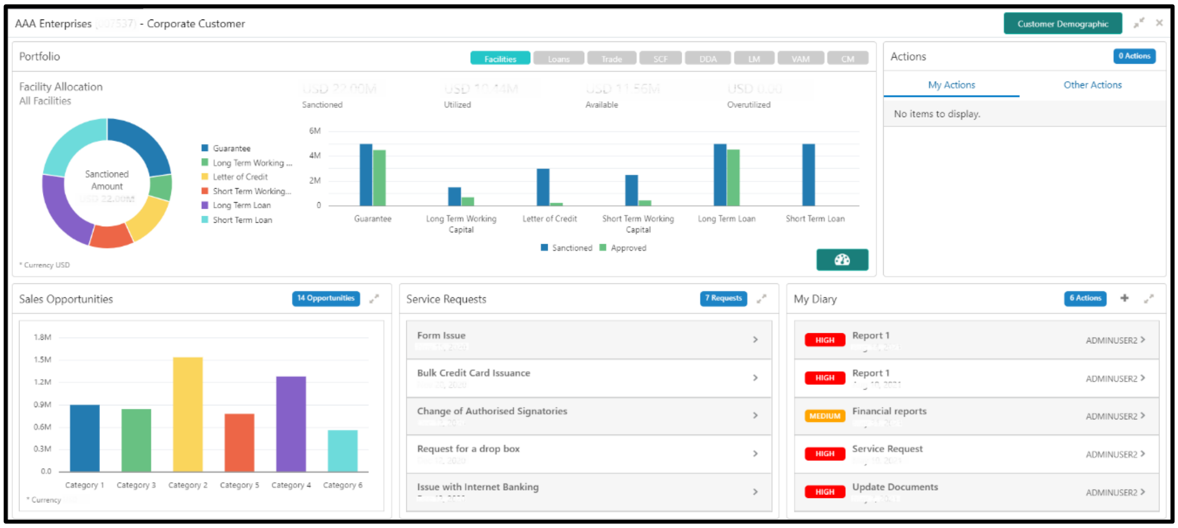
Figure 1: Customer Search



3. Select the required customer and click **View Customer 360**.

   → The system displays the **Corporate 360** page.

Figure 2: Corporate 360



2.2.1 Customer Demographics

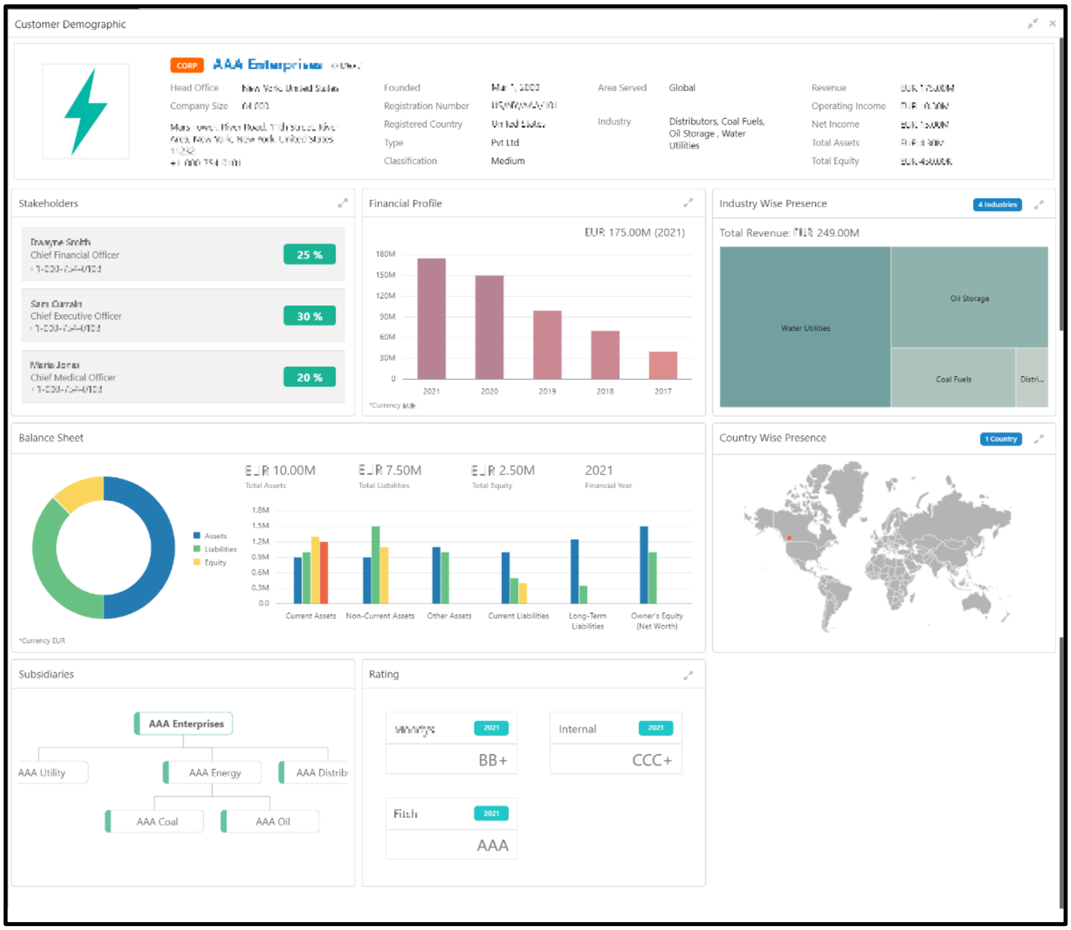
Customer Demographic information can be seen by clicking on the **Customer Demographic** button available on the top right Corner of the screen. This page consists of basic details about the Corporate's business. The following table describes the different sections in the **Corporate Demographic** page. You can click the icon to view the details of information in each widget.

Table 4: Corporate Demographic Sections

Sections	Description
Demographic Details	Contains the following basic details of the business: • Logo • Name • Address • Contact details • Registration details • Classification • Industry sector • Revenue • Operating income • Assets • Equity
Stakeholders	The key stakeholders for the business – Management Team, Sponsors, Guarantors, Suppliers, Bankers, Insurers
Financial Profile	Financial profile of the customer that includes balance sheet details, revenue, operating profit, net profit, return on investment, return on equity, return on asset
Industry wise presence	Different industry sectors to which the Corporate caters to

Sections	Description
Balance Sheet	Balance sheet details for the Corporate – Asset, Liability, Owner’s Equity
Country Wise Presence	List of countries where the business is operational
Subsidiaries	A view of the corporate’s business hierarchy including all the subsidiary companies
Rating	Credit rating for the Corporate provided by external rating agencies/internal rating provided by the bank

Figure 2: Customer Demographic Screen



2.2.1.1 Basic Details

This section contains the following basic details of the corporate:

- Name
- Address
- Contact information
- Industry segment
- Areas served
- Revenue
- Operating income
- Net income

Figure 3: Basic Details

2.2.1.2 Stakeholder Information

This widget contains the details of the key stakeholders for the Corporate.

Figure 4: Stakeholders

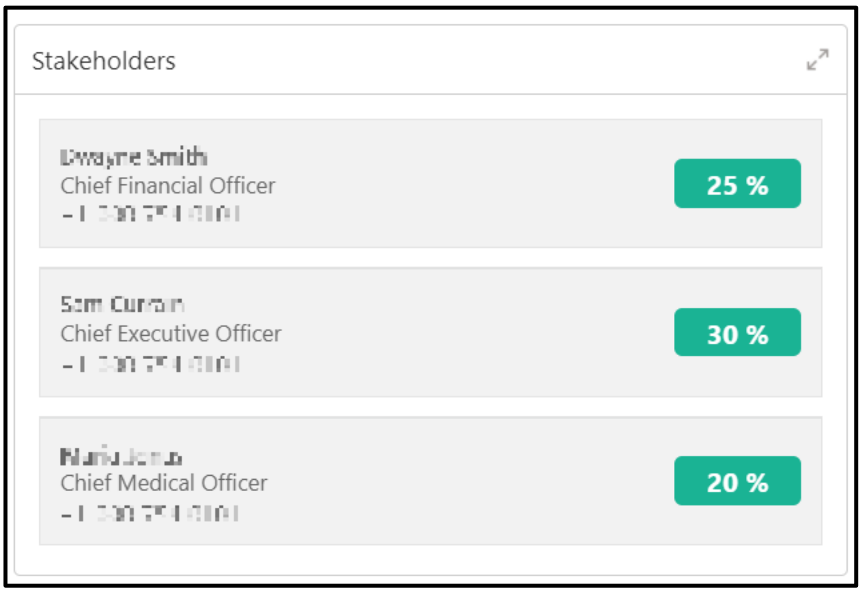
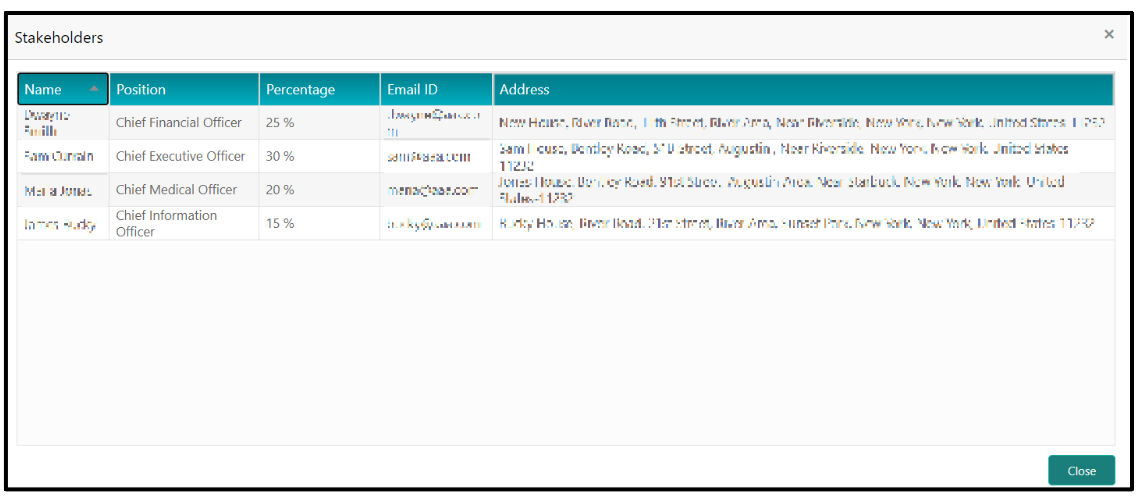


Figure 5: Stakeholders – Expanded View



2.2.1.3 Financial Profile

The widget displays the financial details like Revenue, Operating Income, Net Income for the corporate.

Figure 6: Financial Profile

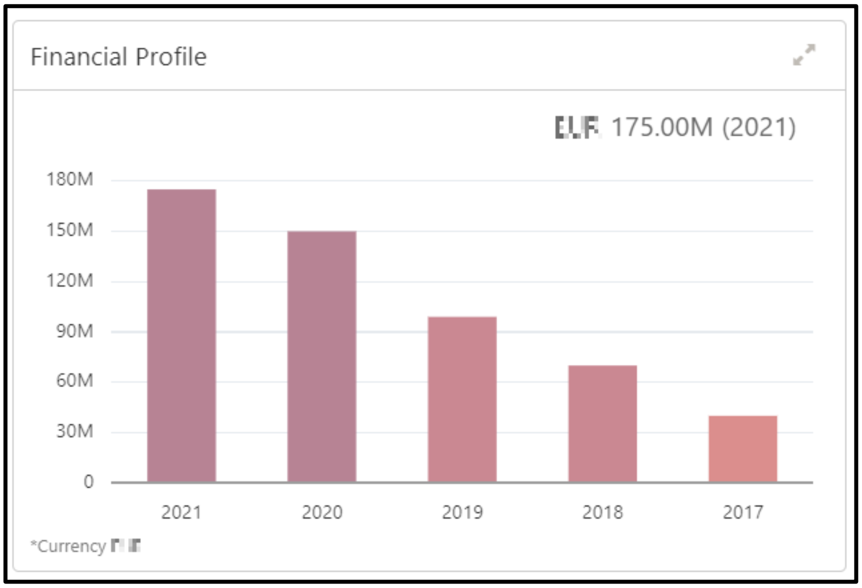
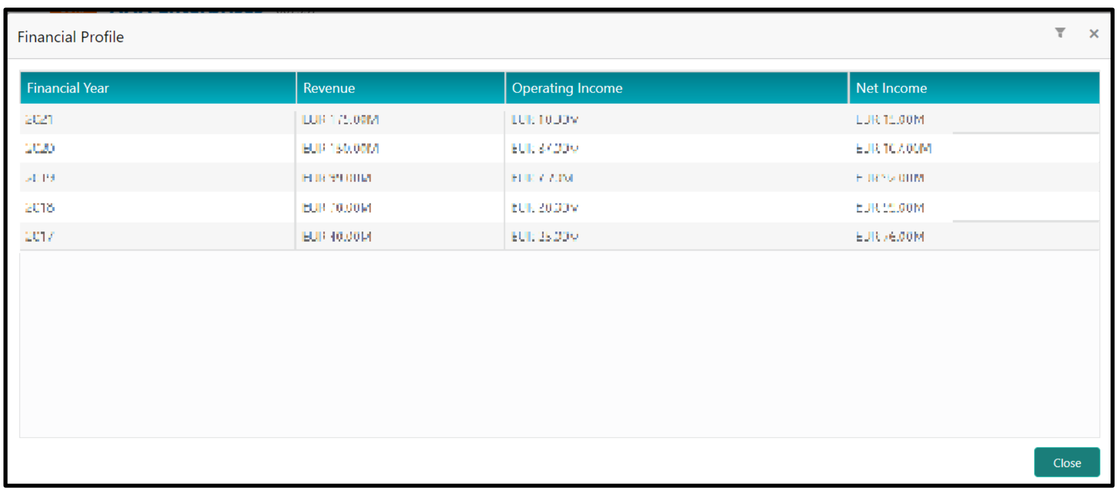


Figure 7: Financial Profile – Expanded View



2.2.1.4 Industry Wise Presence

This widget displays the different industry sectors to which the Corporate Caters to.

Figure 8: Industry Wise Presence

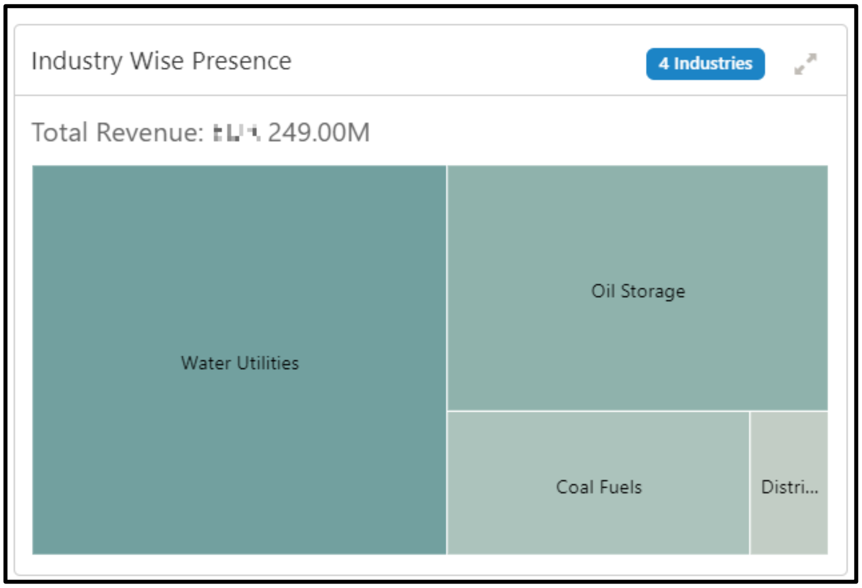
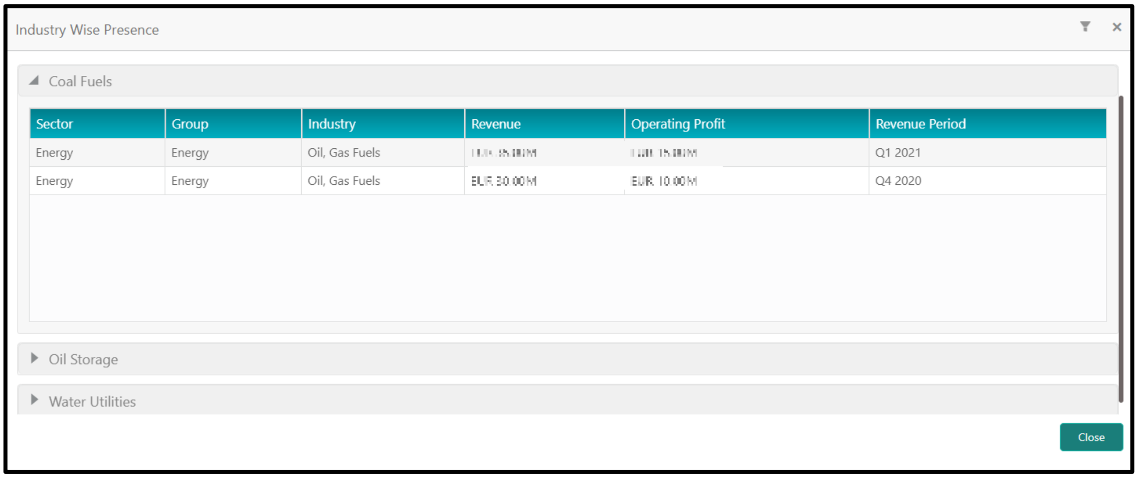


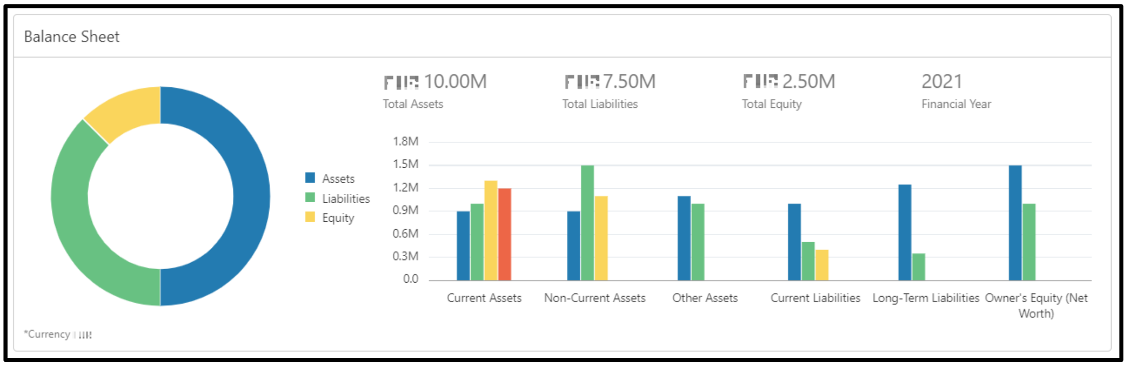
Figure 9: Industry Wise Presence – Expanded View



2.2.1.5 Balance Sheet

This widget contains information about the Corporate's Balance Sheet.

Figure 10: Balance Sheet

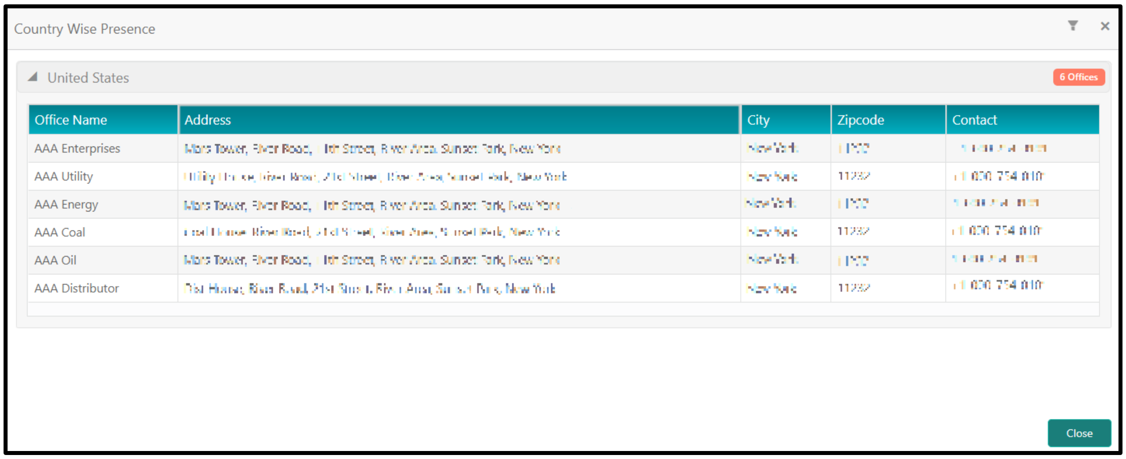


2.2.1.6 Country Wise Presence

This widget displays the information about the countries where Corporate has offices.

Figure 11: Country Wise Presence

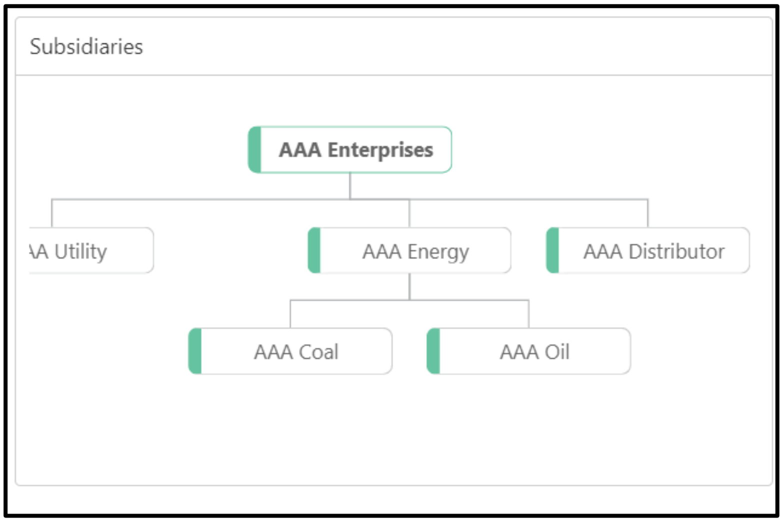
Figure 12: Country Wise Presence – Expanded View



2.2.1.7 Subsidiaries

This widget contains the information about the corporate hierarchy and the subsidiary companies.

Figure 13: Subsidiaries



2.2.1.8 Rating

This widget contains the credit rating of the corporate provided by external credit rating agencies or internal ratings provided by the Bank.

Figure 14: Credit Ratings

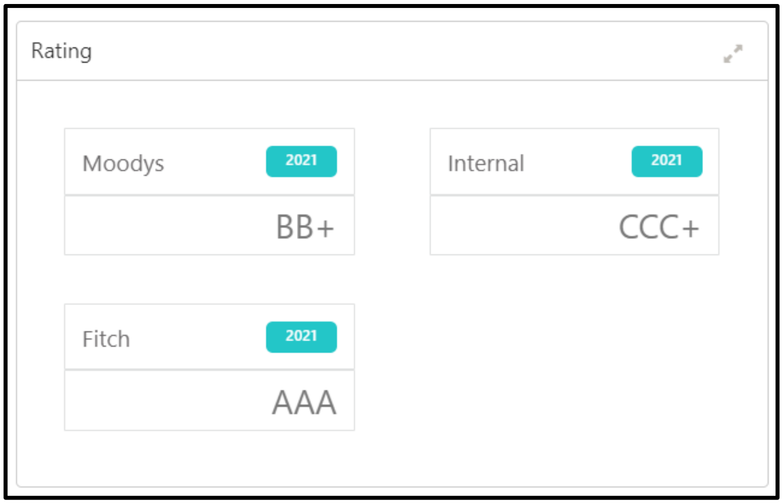
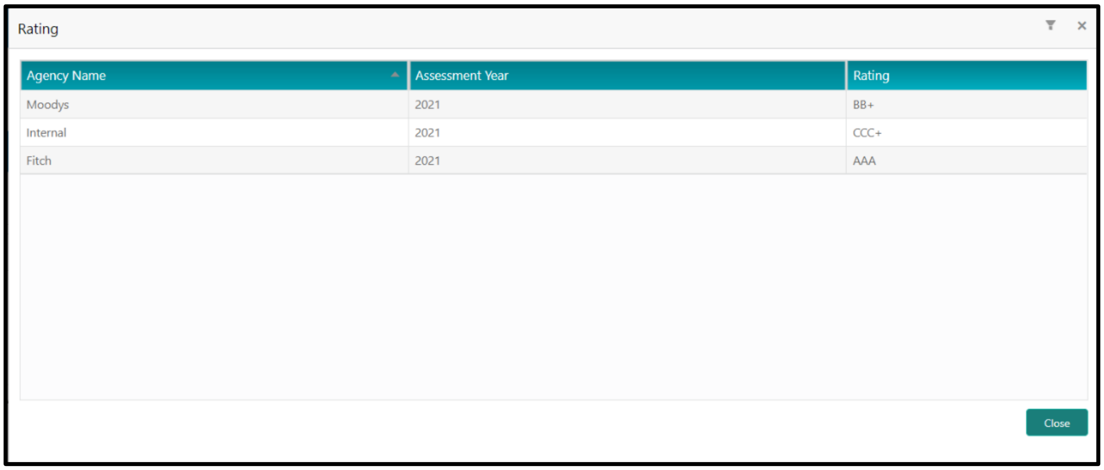


Figure 15: Credit Ratings – Expanded View



Agency Name	Assessment Year	Rating
Moodys	2021	BB+
Internal	2021	CCC+
Fitch	2021	AAA

2.2.2 Portfolio

Portfolio section contains the details of the product portfolio held by the Corporate with the Bank. The portfolio section contains details of following products:

- Facilities
- Loans
- Trade
- Supply Chain Finance (SCF)
- Liquidity Management (LM)
- Virtual Account Management (VAM)
- Cash Management (CM)

Widgets corresponding to the products subscribed by the Corporate will only be displayed in Portfolio section.

Figure 16: Portfolio Section

Click on the respective product button on the top left of the portfolio to navigate to the widget corresponding to that product. For more information, click on the speedometer icon present at the right bottom corner of the portfolio widget. This will navigate to the selected product 360 view.

Figure 17: Facilities

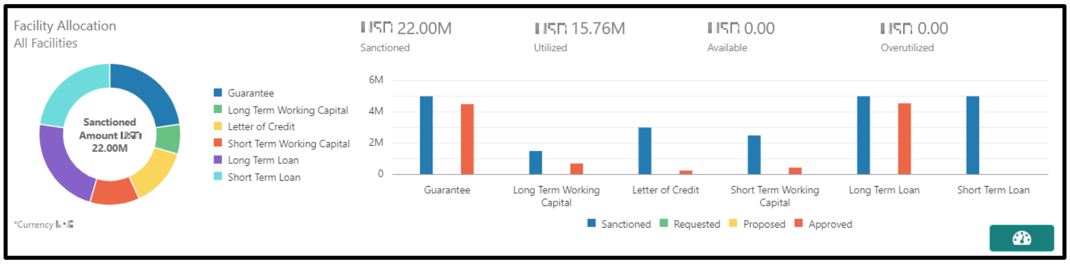


Figure 18: Loans

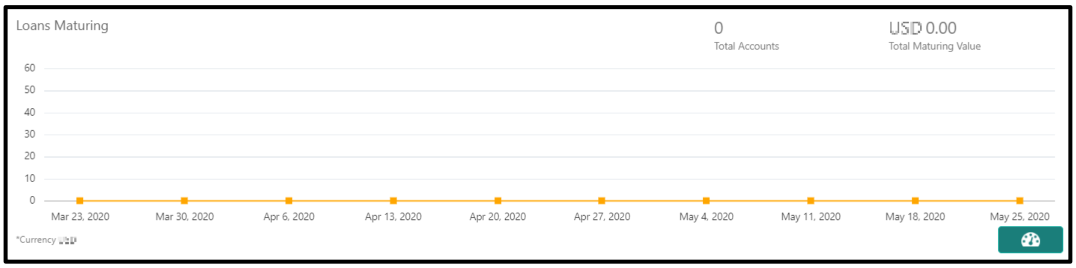


Figure 19: Trade

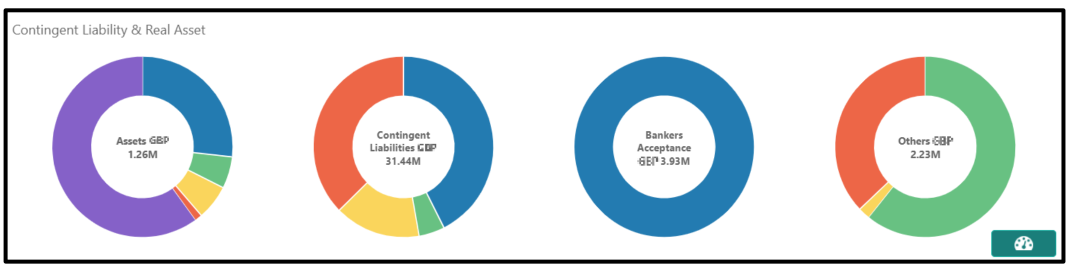


Figure 20: Supply Chain Finance (SCF)

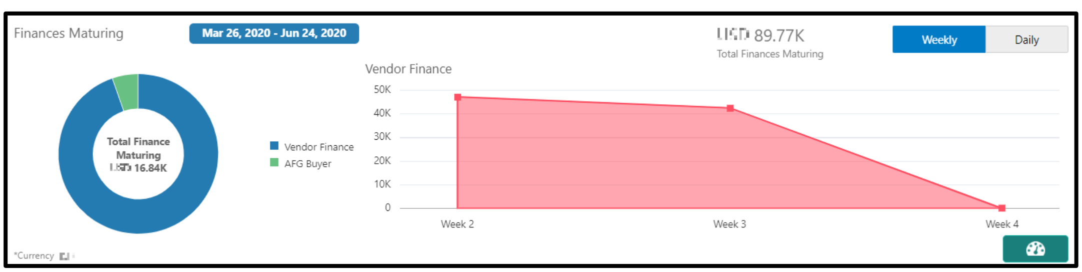


Figure 21: Liquidity Management (LM)

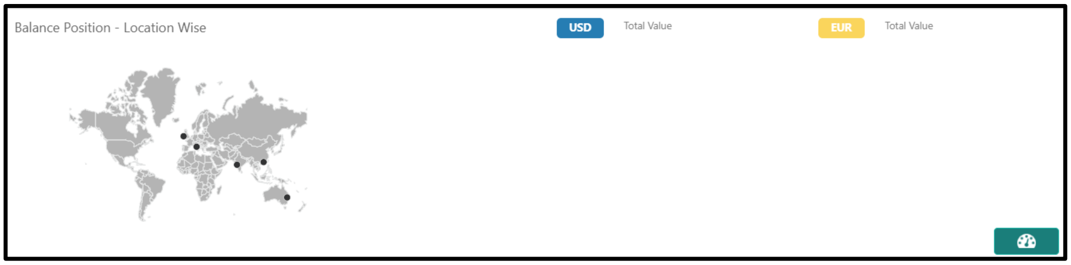


Figure 22: Virtual Account Management (VAM)

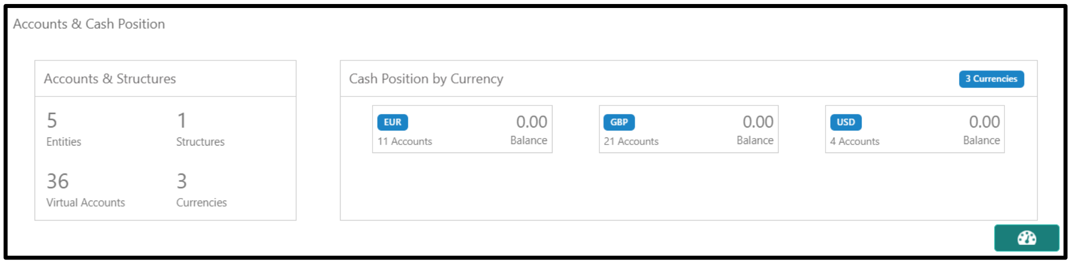
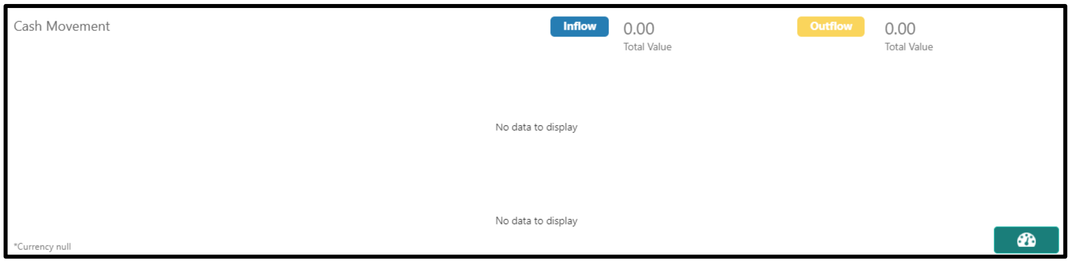


Figure 23: Cash Management (CM)



2.2.3 Actions

Actions widget contains the information about the pending action related to the client. Actions are displayed corresponding to the product selected in Portfolio widget. By periodically monitoring this section, the RM can well prioritize their actions to be performed.

Actions are further groups as:

- My Actions – the pending actions assigned to the logged-in relationship manager
- Other Actions – the pending actions assigned users other than the logged-in relationship manager

Figure 24: Actions

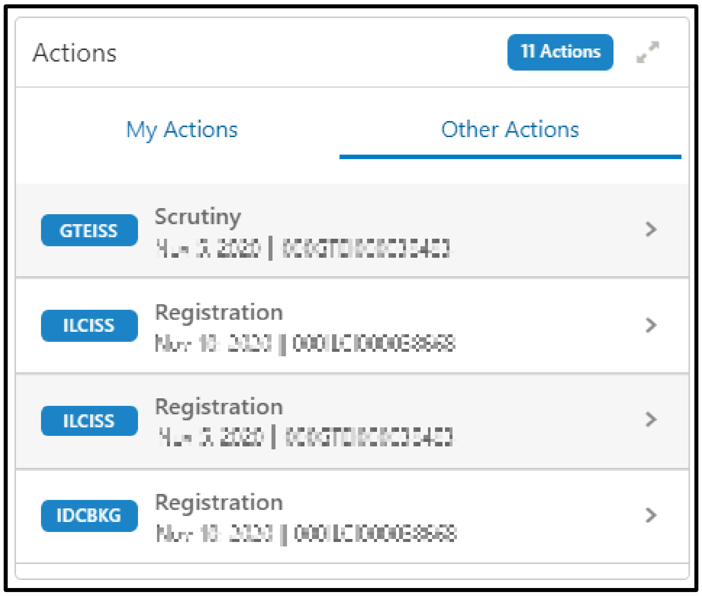
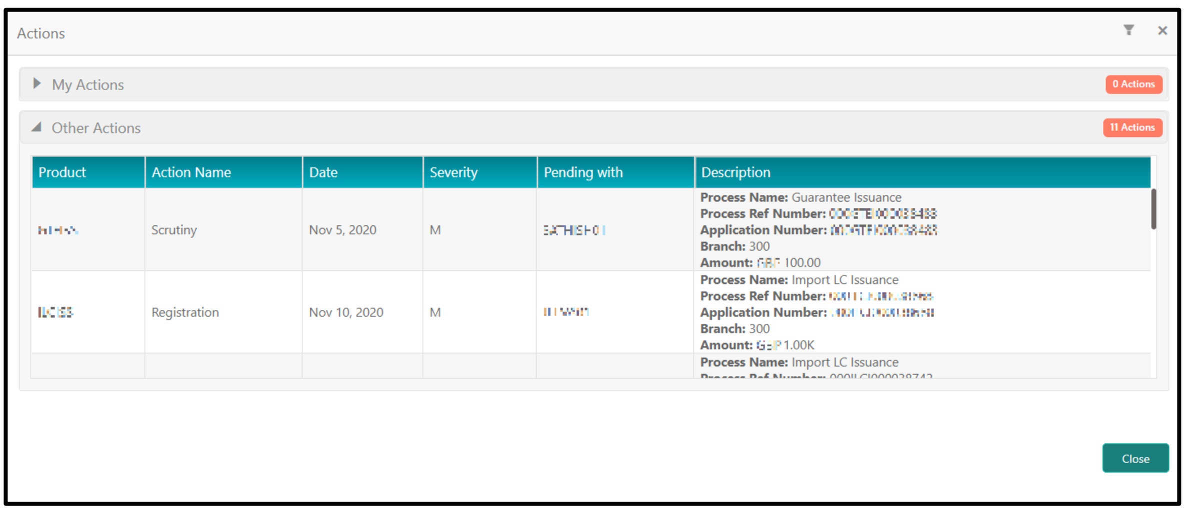


Figure 25: Actions - Expanded View



In the expanded view, the records can be filtered on following parameters:

- Severity
- Pending with (the user to whom the actions are assigned)

You can click on the icon to filter the records in expanded view.

2.2.4 Sales Opportunities

In this widget, the sales opportunities (upsell/cross sell) associated with the corporate customer are displayed. It helps the RM to better understand the prospects of new business activities with the customer.

Figure 26: Sales Opportunities

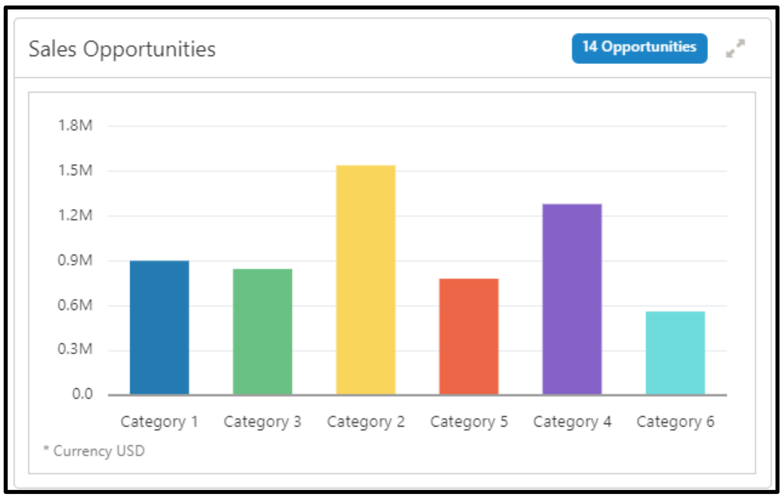
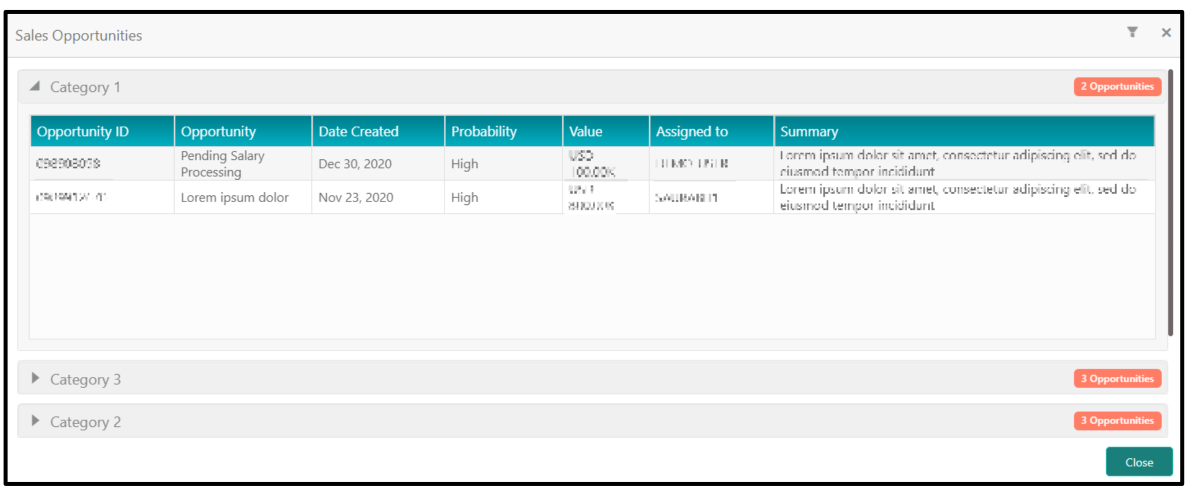


Figure 27: Sales Opportunities - expanded view



In the expanded view, the records can be filtered on following parameters:

- Product
- Date
- Value
- Probability

You can click on the icon to filter the records in expanded view.

2.2.5 Service Requests

This widget contains the outstanding service requests raised by the customer. By periodically monitoring this widget, the relationship manager can do follow-ups and help address the issues faster.

Figure 28: Service Requests

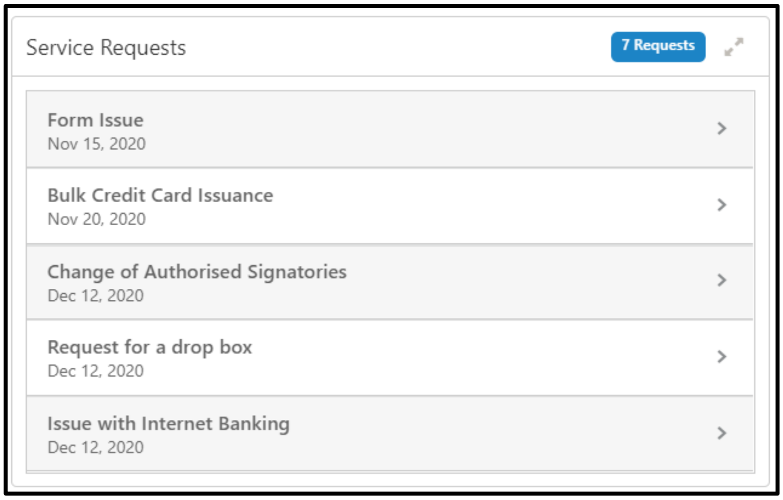
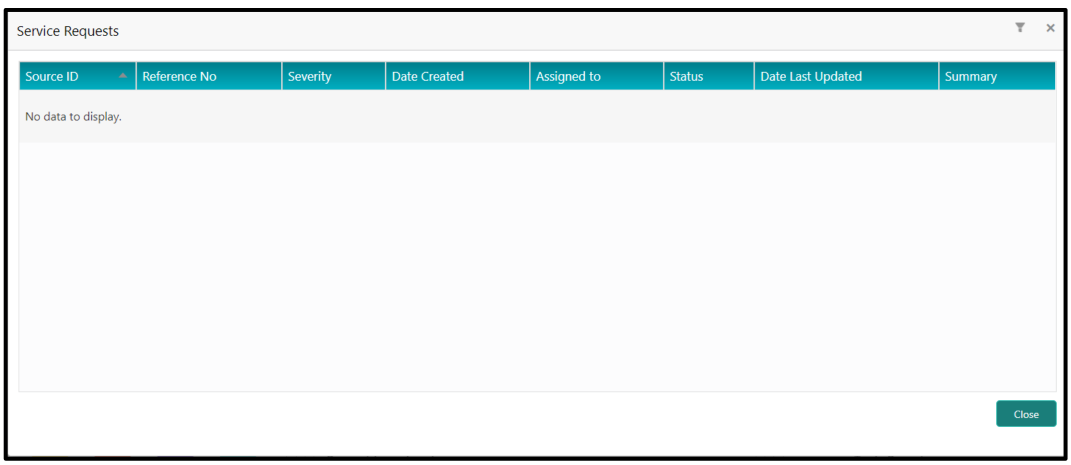


Figure 29: Service Requests – Expanded View



In the expanded view, the records can be filtered on following parameters:

- Severity
- Date
- Assigned to
- Status

You can click on the icon to filter the records in expanded view.

2.2.6 My Diary

This widget is meant to track the to-do list for a relationship manager. Relationship manager can add entries to My Diary or the tasks that he/she needs to perform in near future. Using this widget, the relationship manager can assign priorities to the tasks, set a due date and status for the task.

Figure 30: My Diary

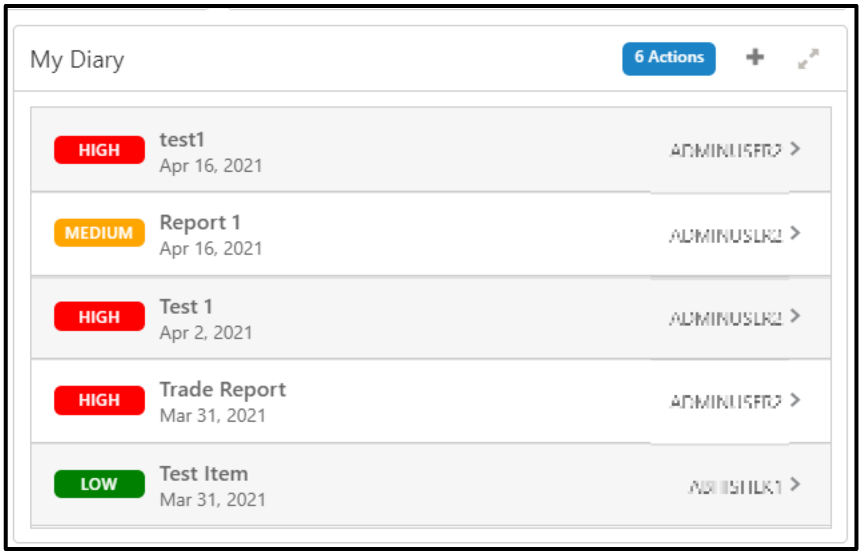
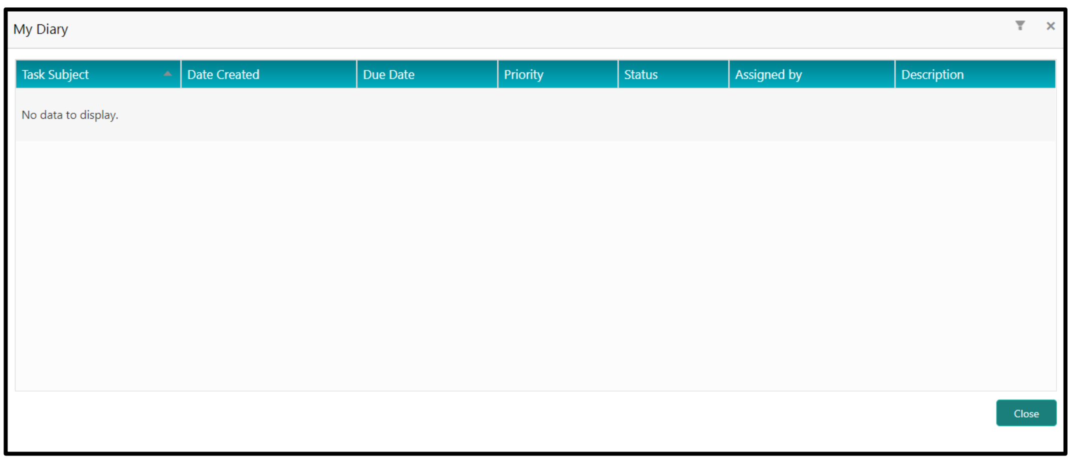


Figure 31: My Diary – Expanded View



In the expanded view, the records can be filtered on following parameters:

- Priority
- Due Date
- Status

You can click on the icon to filter the records in expanded view.

3 List Of Menus