Oracle® Banking Digital Experience Cloud Service

Quick Snapshot User Manual

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Oracle Banking Digital Experience Cloud Service Quick Snapshot User Manual, Release 25.1.1.0.0

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Preface

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- Audience
- Documentation Accessibility
- Diversity and Inclusion
- Conventions
- Related Resources
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Purpose

This guide is designed to help acquaint you with the Oracle Banking application. This guide provides answers to specific features and procedures that the user need to be aware of the module to function successfully.

Audience

This document is intended for the following audience:

- Customers
- Partners

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build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Related Resources

For more information on any related features, refer to the following documents:

- Oracle Banking Digital Experience Installation Manuals
- Oracle Banking Digital Experience Licensing Manuals

Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes; actual screens that appear in the application may vary based on selected browser, theme, and mobile devices.

Acronyms and Abbreviations

The list of the acronyms and abbreviations used in this guide are as follows:

Table 1 Acronyms and Abbreviations

Abbreviation	Description
OBDX	Oracle Banking Digital Experience

Basic Actions

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Most of the screens contain icons to perform all or a few of the basic actions. The actions which are called here are generic, and it varies based on the usage and the applicability. The table below gives a snapshot of them:

Table 2 Basic Actions and Descriptions

Action	Description
Back	In case you missed to specify or need to modify the details in the previous segment, click **Back** to navigate to the previous segment.
Cancel	Click **Cancel** to cancel the operation input midway without saving any data. You will be alerted that the input data would be lost before confirming the cancellation.
Next	On completion of input of all parameters, click **Next** to navigate to the next segment.
Save	On completion of input of all parameters, click **Save** to save the details.
Save & Close	Click **Save & Close** to save the data captured. The saved data will be available in **View Business Product** with *In Progress* status. You can work on it later by picking it from the **View Business Product**.
Submit	On completing the input of all parameters, click **Submit** to proceed with executing the transaction.
Reset	Click **Reset** to clear the data entered.
Refresh	Click **Refresh** to update the transaction with the recently entered data.
Download	Click **Download** to download the records in PDF or XLS format.

Symbols and Icons

The following are the symbols/icons you are likely to find in this guide:

Table 3 Symbols and Icons

Symbols and Icons	Description
	Add data segment
	Close
	Maximize
	Minimize
	Open a list
	Open calendar
	Perform search
	View options
	View records in a card format for better visual representation.

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Table 3 (Cont.) Symbols and Icons

Symbols and Icons	Description
	View records in tabular format for better visual representation.

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Quick Snapshot

This topic provides the systematic instructions for using the Quick Snapshot feature to view balances and transactions for current and savings accounts.

Quick Snapshot feature is available on the login page of Futura bank mobile application. Using this option retail user can view the account summary from mobile application and get important account information in a single view without going on the dashboard.

Pre-requisites

- The User must download Futura bank Application and have a valid account with bank with online banking enabled.

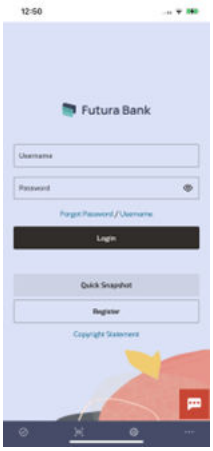
To view accounts summary:

Option 1:From the pre-login page, enable the Quick Snapshot

1. Launch the **Futura bank** application Page.

   The **Futura bank** login page appears.

Figure 1-1 Futura bank home page



2. Click on the **Quick Snapshot**.

   The **Quick Snapshot** screen appears.

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Figure 1-2 Enable Quick Snapshot Feature

3. Click on the **Login to Enable** to enable quick snapshot feature from **Futura bank** application for the first time.

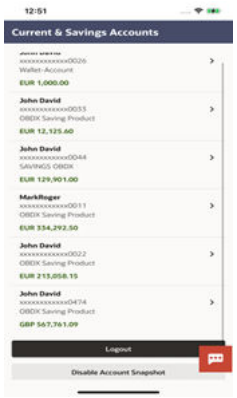
   The **Future bank** login page appears to authenticate the user before enabling.

4. Login to **Futura Bank** app.

   After authentication is successful, user is redirected to account snapshot screen. Application displays the recent transactions of Current and Savings accounts with account details.

> **Note**
>
> This is one time activity for enabling the quick snapshot. From next time user will directly be taken to account snapshot after clicking on **Quick Snapshot** button on the main login page of the mobile application.

Figure 1-3 Account Snapshot



> **Note**
>
> The fields which are marked as Required are mandatory.

For more information on fields, refer to the field description table.

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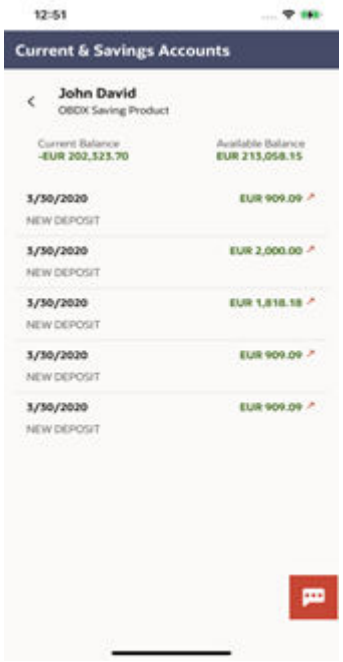
Table 1-1 Account Snapshot - Field Description

Field Name	Description
Account Nickname	The nickname given to the account by the account holder.
Account Balance	The current balance in the account.
Account Number	Account number in masked format.
Product Name	The name of the CASA product.

> **Note**
>
> Click the › icon to view the transaction details.

Figure 1-4 Account Details Page



5. Click **Disable Account Snapshot** to disable the quick account snapshot facility for the account.

   The **Warning** modal window appears to confirm.

   a. Click **Yes** to disable the quick snapshot facility.

      OR

      Click **No** to cancel the process.

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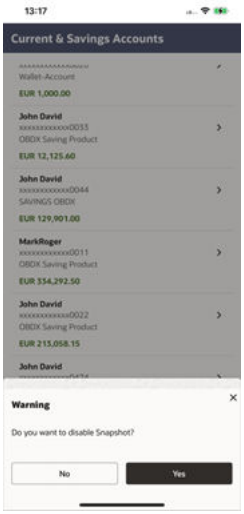
Figure 1-5 Disable Account Snapshot



Logout from Snapshot

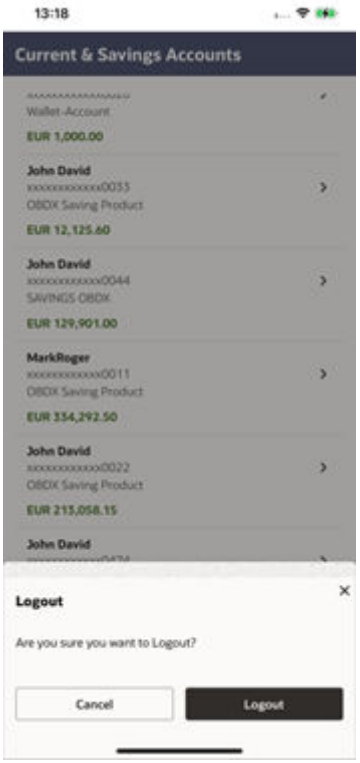
This option will logs out the user from Snapshot view. User will have to login again when he clicks on Quick Snapshot button on login page.

- The **Warning** modal window appears to confirm.
  a. Click **Yes** to logout.

     OR

     Click **No** to cancel the process.

Figure 1-6 Logout from Snapshot



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Option 2:From phone widgets

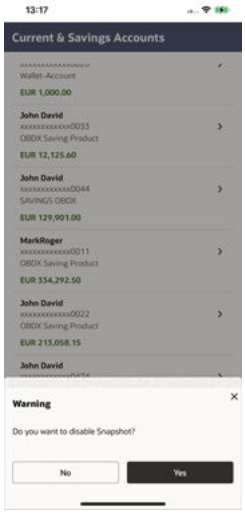
User can add OBDX widgets from the device like other widgets like weather, notes etc. There are three widgets which shows account details and summary.

> **Note**
>
> For the widgets to display account information, user needs to enable Quick Snapshot.

6. If user has not enabled Quick Snapshot (Refer section: From the pre-login page, enable the Quick Snapshot), then widgets on home screen will display below message.

   Clicking the widget, user will be redirected to **Quick Snapshot Enabled** page.

Figure 1-7 Quick Snapshot Enabled



- Recent Activity widget
  This topic provides the systematic instructions for viewing the activities and functions displayed in the Recent Activity widget.
- View the multiple account summary
  This topic provides the systematic instructions for viewing their account summary from the Snapshot widget.
- Multi-functional Account Snapshot widget
  This topic describes the details features and function of the Multiple Account Snapshot widget.

1.1 Recent Activity widget

This topic provides the systematic instructions for viewing the activities and functions displayed in the Recent Activity widget.

The **Recent Activity** widget on the home page displays the summary of the primary account. The widget displays the account available balance of Current and Savings account and last 3 transactions on those accounts along with the date of transaction.

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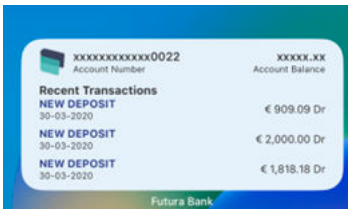
> **Note**
>
> a. The criteria to view multiple CASA account summary is the retail user who should have at least one CASA bank account, has downloaded the mobile application, and activated the screenshot function.
>
> b. In case of joint CASA accounts if the primary account number is not setup, then shows the summary of the first account from the CASA accounts list.

1. Login to the **Futura bank** application.

   The **Recent Activity** widget on the **Futura bank** home page displays the all the debit and credit entries along with each transaction amount.

Figure 1-8 Account Balance and Recent Transaction Details



> **Note**
>
> In case of Joint CASA account if the primary account number is not setup then shows the summary of the first account from the CASA accounts list;
>
> To set primary account, navigate from **Account Settings**, click **Preferences**, and then click **Primary Account Number**, and then select an account **Please setup a primary account** to use futura Bank's widget.

2. Toggle to mask the account balance.

   App displays the **Account Balance** in masked format.

   In IOS, long press on the **widget**, and then click **Edit Widget**, and then select **Toggle Mask** option.

> **Note**
>
> By default, App displays the account balance in unmasked format.

For more information on fields, refer to the field description table.

Table 1-2 Account Balance and Recent Transaction Details - Field Description

Field Name	Description
Account Number	Account number in masked format.
Account Balance	The current balance in the account.

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Table 1-2 (Cont.) Account Balance and Recent Transaction Details - Field Description

Field Name	Description
Recent Activity	
Description	Short description of the transaction.
Date	Date on which the transaction was performed.
Amount	Transaction amount along with the debit/credit indicator and currency.

1.2 View the multiple account summary

This topic provides the systematic instructions for viewing their account summary from the Snapshot widget.

On the home screen, the widget is provided to view their account summary if the user has more than one bank account. The widget on the home page displays the multiple account summary of the registered retail user.

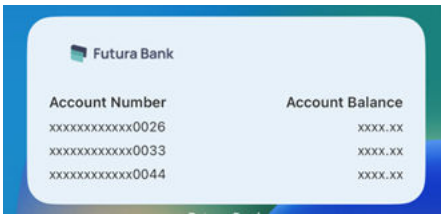
> **Note**
>
> a. The criteria to view multiple CASA account summary is the retail user who should have at least one CASA bank account, has downloaded the mobile app, and activated the screenshot function.
>
> b. The widget displays the top three accounts.

To view multiple accounts summary:

1. Click on the **Snapshot** widget icon.

   It redirects to accounts snapshot page.

Figure 1-9 Snapshot widget



> **Note**
>
> In case of Joint CASA account if the primary account number is not setup then shows the summary of the first account from the CASA accounts list;
>
> To set primary account, navigate from **Account Settings**, click **Preferences**, and then click **Primary Account Number**, and then select an account **Please setup a primary account** to use futura bank's widget.

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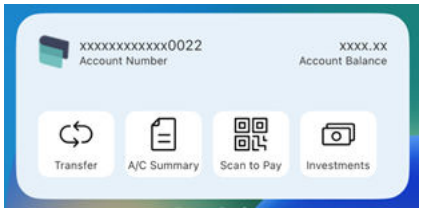
2. Perform one of the following actions:
   - Long press on widget, and click **Edit Widget** and toggle to mask and unmask the accounts for iOS users of the accounts.
   - Click the icon to mask, and unmask the accounts for Android users of the accounts.

> **Note**
>
> By default App displays the accounts' balances in unmasked format.

1.3 Multi-functional Account Snapshot widget

This topic describes the details features and function of the Multiple Account Snapshot widget.

Figure 1-10 Multiple Account Snapshot widget



This widget provides details of the primary account if configured or the first account from the list. It displays the account balance in masked format. To unmask, follow steps mentioned in above section. In addition to the details, it also provides user with multiple options like Scan to pay, View Credit Card Account/summary, view investment dashboard and transfer money.

For more information on fields, refer to the field description table.

Table 1-3 Multiple Account Snapshot widget - Field Description

Field Name	Description
Account Nickname	The nickname given to the account by the account holder.
Account Balance	The current balance in the account.
Account Number	Account number in masked format.

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2 FAQ

1. **What is the benefit of using Quick Snapshot feature?**
   Quick Snapshot is a quick & convenient way to access your accounts summary, without any need to login to application.
2. **Who can use Quick Snapshot feature?**
   Any futura bank customer who has downloaded mobile application can use this feature
3. **Is this feature available for all type of accounts (Current, Savings, Loan, Deposits and Credit Cards)?**
   No, this feature is only available for Current and Savings accounts.
4. **How can the user disable Quick Snapshot?**
   User can anytime disable this feature by clicking on Disable Quick Snapshot button on the Quick Snapshot screen.
5. **Do I need to authenticate myself with my credentials/ alternate login every time I access quick snapshot?**
   You will need to authenticate only when you are enabling quick snapshot, subsequently clicking on quick snapshot will display the account summary and recent transactions without any authentication.
6. **What is Operating system requirements for Augmented Reality (AR) use case?**
   For iOS minimum support version is iOS 13 and for Android it's Android 6.

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