

Customer Priority Maintenance User Guide
Oracle Banking Trade Finance Process Management
Release 14.6.0.0.0

Part No. F57088-01

May 2022

Oracle Banking Trade Finance Process Management - Customer Priority Maintenance User Guide
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Customer Priority Maintenance

Customer Priority Maintenance process enables the OBTFPM user to maintain Customer Priorities by linking to the Priority Codes and the Process codes.

This section contains the following topics:

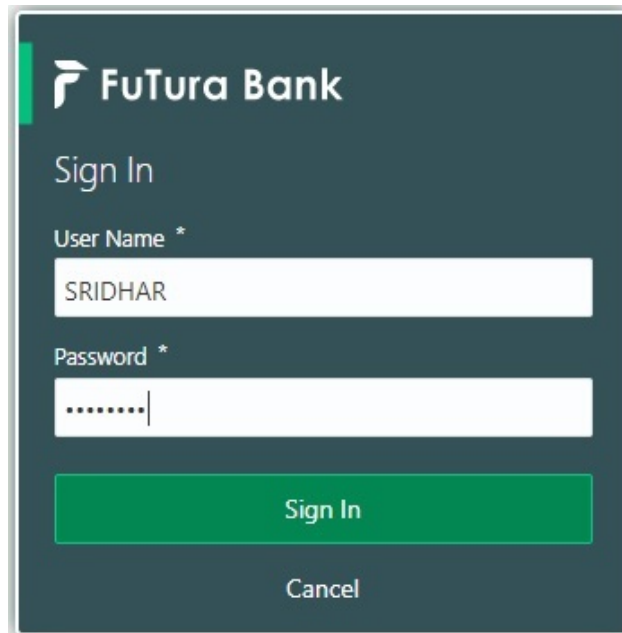
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[View Customer Priority Maintenance](#)

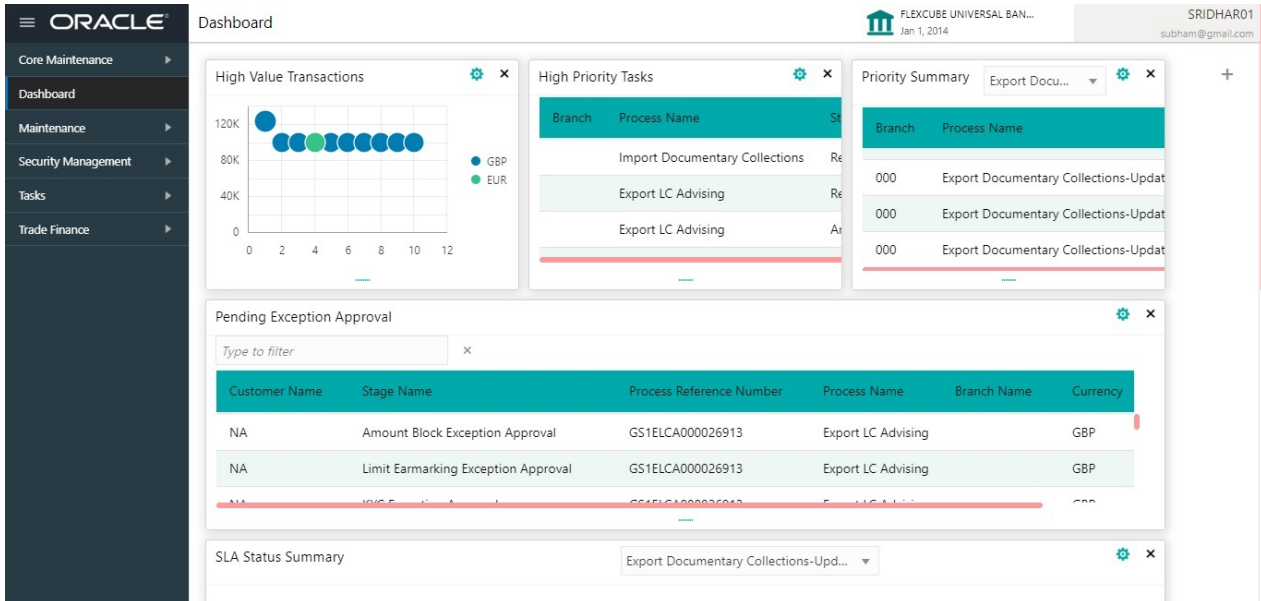
Create Customer Priority

This process allows the user to create customer priority. In the subsequent steps, let's look at the steps of creating a customer priority maintenance process:

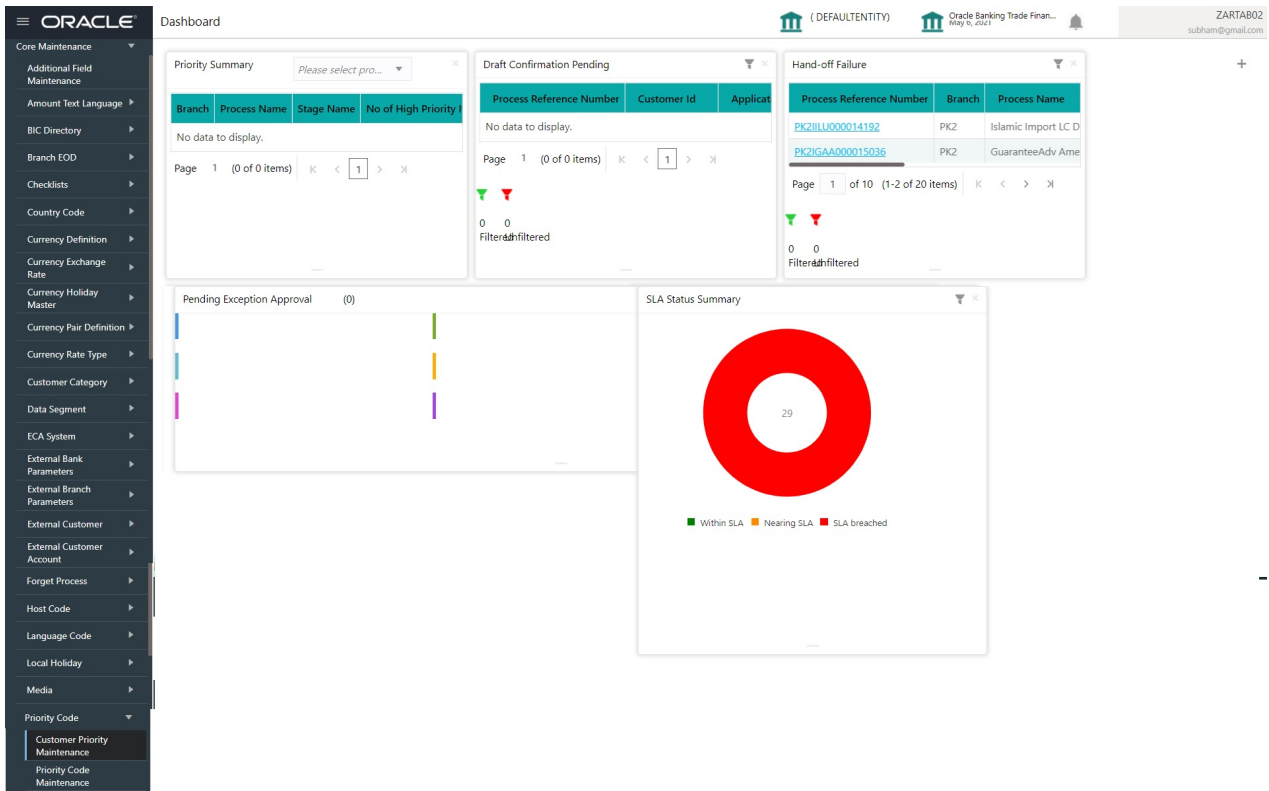
1. Using the entitled login credentials for Registration stage, login to the OBTFPM application.

A screenshot of the FuTura Bank Sign In interface. The background is dark teal. At the top left is the FuTura Bank logo, which consists of a green square with a white stylized 'F' followed by the text 'FuTura Bank' in white. Below the logo, the text 'Sign In' is displayed in white. There are two input fields: 'User Name *' with the text 'SRIDHAR' entered, and 'Password *' with masked characters '.....'. Below the input fields are two buttons: a green 'Sign In' button and a white 'Cancel' button with a dark teal border.

2. On login, user must be able to view the dashboard screen with widgets as mapped to the user.



3. Click **Core Maintenance > Priority Code > Customer Priority Maintenance**.



The **Customer Priority Maintenance** screen is displayed.

Customer Priority Maintenance

Page 1 of 0 (1 - 0 of 0 items)

4. Click Plus icon. The **Customer Priority Maintenance** screen with fields appear.

Customer Priority Maintenance

Customer No. 001044 Customer Name GOODCARE PLC Branch PK2-Oracle Banking Trade Finan...

Process Code	Process Name	Priority	Edit
GTEISS	Guarantee Issuance	Medium	
ILCDRW	Import LC Drawings	Low	

Save Cancel

Provide the field description based on the following table.

Field	Description
Customer No.	Specify the customer number or click Search to search and select the customer number from the lookup.
Customer Name	Read only field. System defaults the customer name for the selected Customer No.
Branch	Read only field. System defaults the branch details.
Process Code	Specify the process code or click Search to search and select the process code from the lookup. System fetches all the process code from LOV along with "ALL" option.

Field	Description
Process Name	Read only field. System defaults the process name for the selected Process code.
Priority	Select the priority of the process code. System fetches the list of active Priority Names maintained in the “Priority Code Maintenance” screen.
Edit	Edit button to edit the records before save. The new Priority Code will not be applicable for the uncompleted task.

Action Buttons

Field	Description
Save	Click to save the record. System allows the user to link the Priorities for the customer and should save the record successfully.
Cancel	Click to cancel the record.

5. Click **Save** to save the record.

View Customer Priority Maintenance

The user can view the summary of customer priority maintained in the form of tiles. The user can view the customer priority in the ‘List’ or ‘Table’ form, by clicking the List or Table icon on the top right corner of the screen.

1. Click **Core Maintenance > Priority Code > Customer Priority Maintenance**.

Customer Priority Maintenance

Customer No * 000321 Customer Name Trade Indiv 1 Branch PK2-Oracle Banking Trade Finan...

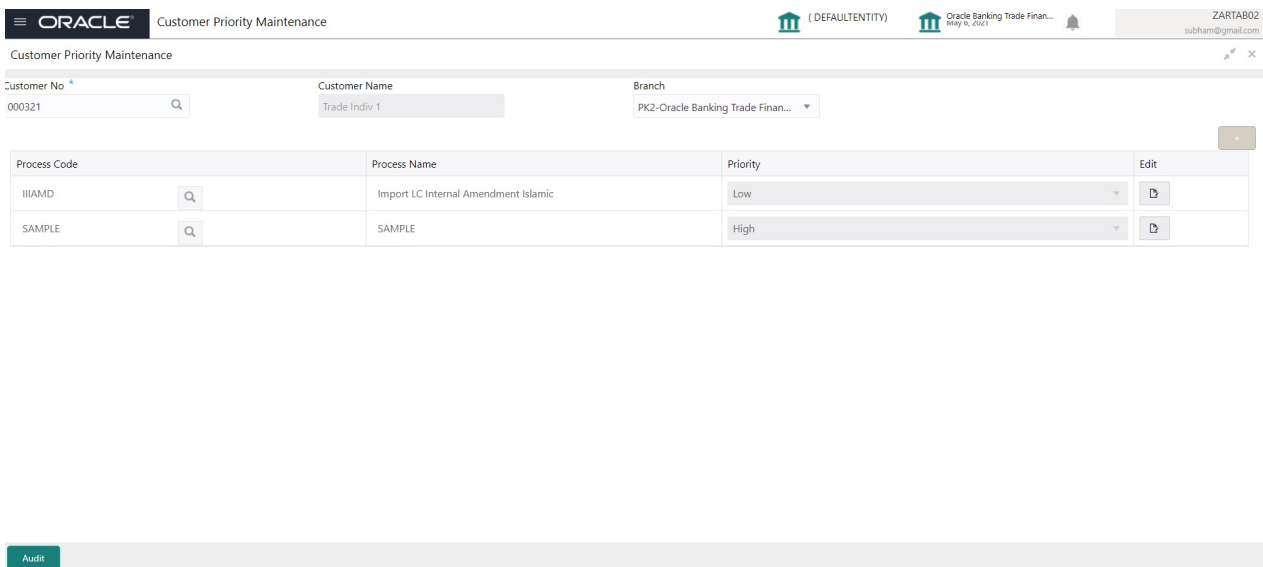
Process Code	Process Name	Priority	Edit
IIAMD	Import LC Internal Amendment Islamic	Low	[Edit]
SAMPLE	SAMPLE	High	[Edit]

Audit

Field	Description
Customer Name	System displays the customer name of the customer.

Field	Description
Customer No.	System displays the customer number of the customer.
Maker ID	System displays the maker ID.
Status	Displays the status of the record. Values are Authorized and Unauthorized.

2. Click the  icon, and then click **Authorize** to Authorize the customer priority maintenance, or **Delete** to delete the customer priority maintenance, or **Unlock** to unlock the customer priority maintenance, or **View** to view the customer priority maintenance in list format.
The **Customer Priority Maintenance screen appears in list format.**



Audit

Maker

 OBTFFPM09

 5/5/2021, 8:12:13 AM

Status

 Unauthorized

 Open

Checker





Modification No

1

Field	Description
Maker ID	System displays the maker ID.
Checker	System displays the checker ID.
Time stamp	System displays the maker id date and time stamp.

Field	Description
Time stamp	System displays the checker id date and time stamp.
Modification No.	Displays the modification number.
Status	Displays the status of the record. Values are Authorized and Unauthorized.

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References

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

- Process Code Maintenance User Guide
- Queue Maintenance User Guide

Documentation Accessibility

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