Quick Snapshot User Manual
Oracle Banking Digital Experience
Release 22.2.0.0.0

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Quick Snapshot User Manual

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1. Preface

1.1 Intended Audience

This document is intended for the following audience*:*

- Customers
- Partners

1.2 Documentation 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.

1.3 Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

1.4 Structure

This manual is organized into the following categories:

Preface gives information on the intended audience. It also describes the overall structure of the User Manual.

Introduction provides brief information on the overall functionality covered in the User Manual.

The subsequent chapters provide information on transactions covered in the User Manual.

Each transaction is explained in the following manner:

- Introduction to the transaction
- Screenshots of the transaction
- The images of screens used in this user manual are for illustrative purpose only, to provide improved understanding of the functionality; actual screens that appear in the application may vary based on selected browser, theme, and mobile devices.
- Procedure containing steps to complete the transaction- The mandatory and conditional fields of the transaction are explained in the procedure. If a transaction contains multiple procedures, each procedure is explained. If some functionality is present in many transactions, this functionality is explained separately.

1.5 Related Information Sources

For more information on Oracle Banking Digital Experience Release 22.2.0.0.0, refer to the following documents:

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

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2. Transaction Host Integration Matrix

Legends

NH	No Host Interface Required.
✔	Pre integrated Host interface available.
✘	Pre integrated Host interface not available.

Sr No	Transaction / Function Name	Oracle FLEXCUBE Core Banking 11.10.0.0.0	Oracle FLEXCUBE Universal Banking 14.6.0.0.0
1	Enable Quick Snapshot	NH	NH
2	Quick Snapshot - Balance Inquiry	✔	✔
3	Quick Snapshot - Recent Transactions	✔	✔
4	Disable Quick Snapshot	NH	NH

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3. Quick Snapshot

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.

Quick Snapshot displays the account balance of Current and Savings account and recent transactions on those accounts.

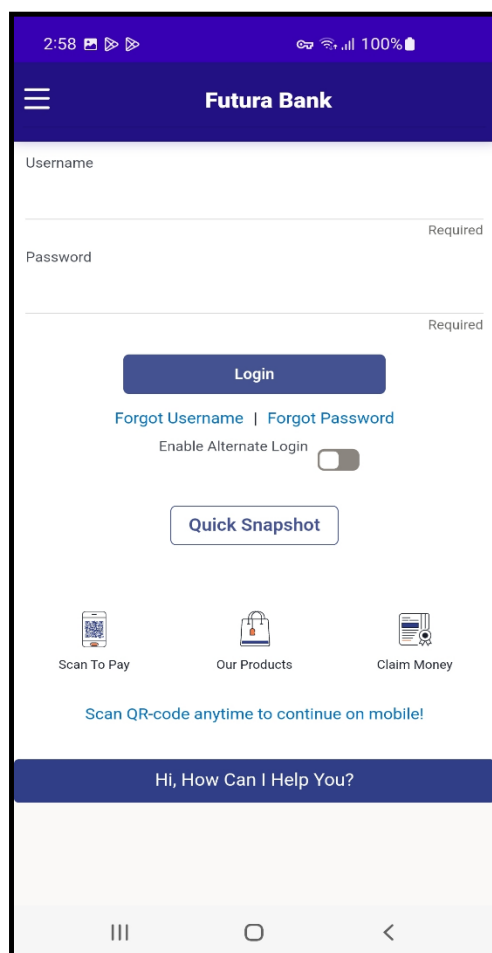**Pre-Requisites**

• 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 to view the snapshot of Current and Savings account.

1. Launch the **futura bank** application Page. The **futura bank** login page appears.

futura bank home page

2. Click on the **Quick Snapshot**. The **Quick Snapshot** screen appears.

Enable Quick Snapshot
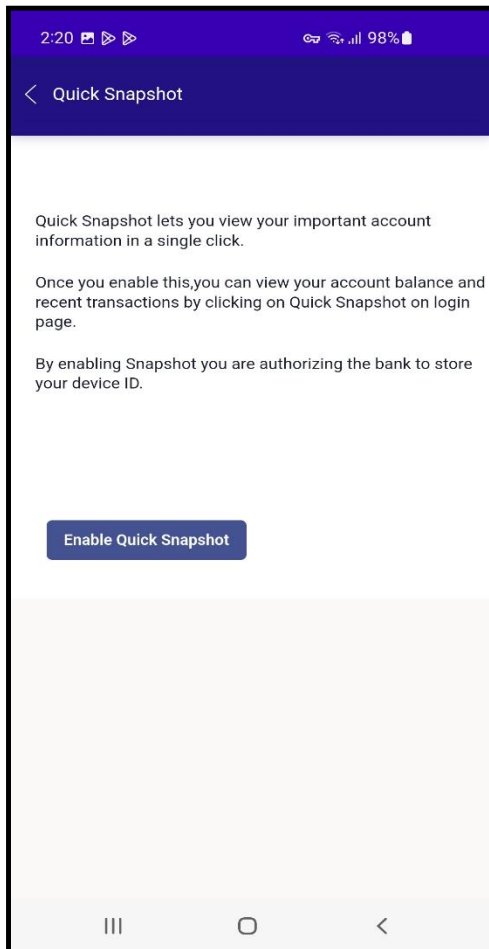
3. Click on the **Enable Quick Snapshot** to enable quick snapshot feature from futura bank application for the first time.
4. On click user is redirected to account snapshot screen. Application displays the recent transactions of Current and Savings accounts with account details.

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.

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Account Snapshot
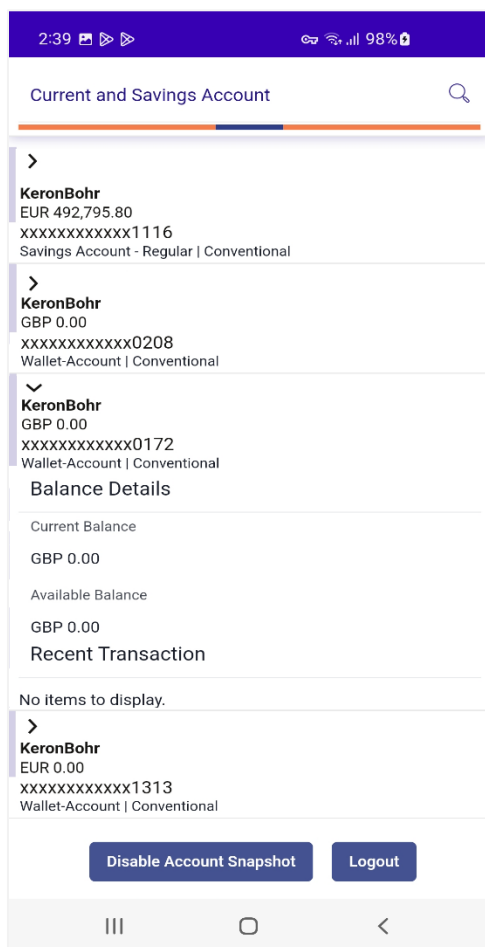
Field Description

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.
Account Type	Type of the account.

Note: Click on the › icon to view the transaction details.

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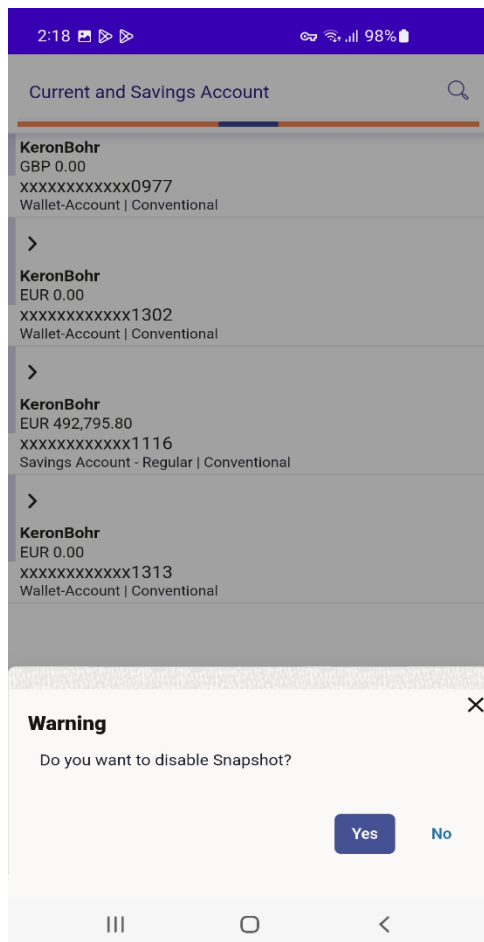5. Click **Disable Account Snapshot** to disable the quick account snapshot facility for the account. The **Warning** modal window appears to confirm.
    OR
    Click **Logout** to log out of the application.

Disable Account Snapshot

a. Click **Yes** to disable the quick snapshot facility.
    OR
    Click **No** to cancel the process.

Option 2: From the futura bank home page

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.

Note: 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.

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

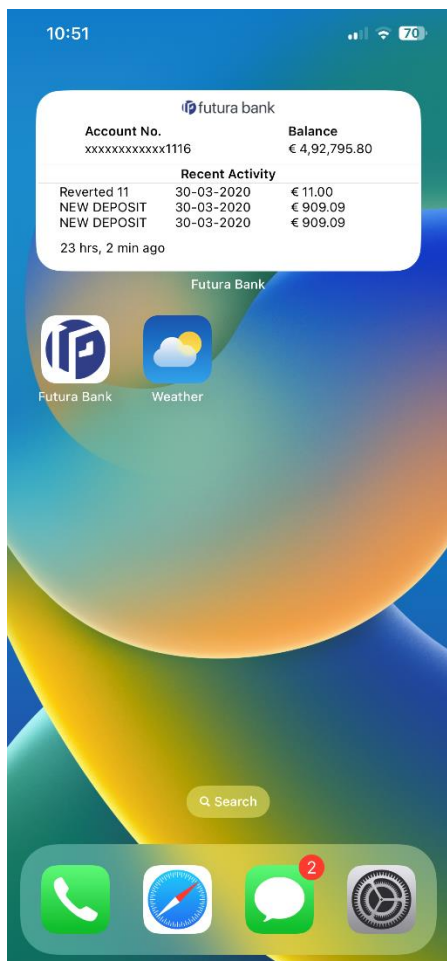**ORACLE**

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, go to Account Settings > Preferences > Primary Account Number and select an account "Please setup a primary account" to use futura bank's widget.

1. Click on toggle to mask the account details. App displays the **Account Balance** in masked format.

Note: By default App displays the account balance in unmasked format.

Field Description

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

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Field Name	Description
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.
Time of snapshot	Displays the time when the snapshot was taken.

<u>FAQs</u>

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.

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