

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

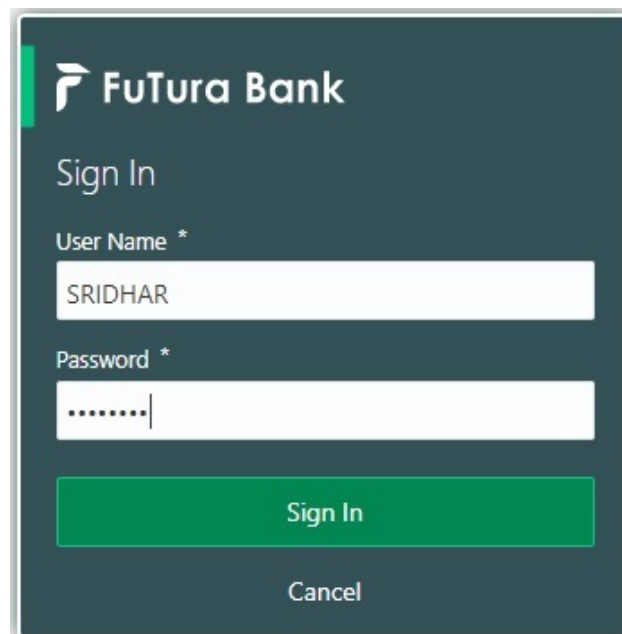
[Create Customer Priority](#)

[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.



The screenshot shows a dark-themed login interface for FuTura Bank. At the top left is the FuTura Bank logo. Below it, the text 'Sign In' is displayed. There are two input fields: 'User Name *' containing the text 'SRIDHAR' and 'Password *' containing masked characters. Below the input fields are two buttons: a green 'Sign In' button and a 'Cancel' button.

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

The screenshot shows the Oracle dashboard for user SRIDHAR01. The dashboard includes several widgets:

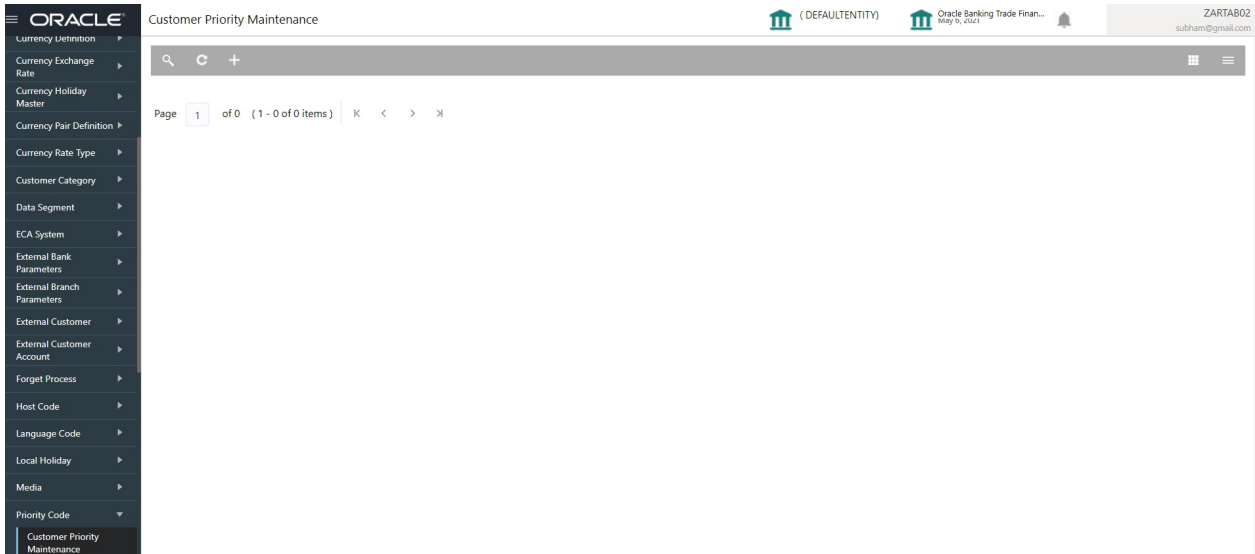
- High Value Transactions:** A bubble chart showing transactions for GBP and EUR across a range of values from 0 to 120K.
- High Priority Tasks:** A table listing tasks such as 'Import Documentary Collections' and 'Export LC Advising' with their respective statuses.
- Priority Summary:** A table showing summary data for various processes, including 'Export Documentary Collections-Update'.
- Pending Exception Approval:** A table listing pending approvals with columns for Customer Name, Stage Name, Process Reference Number, Process Name, Branch Name, and Currency.
- SLA Status Summary:** A widget for monitoring SLA status, with an 'Export' button.

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

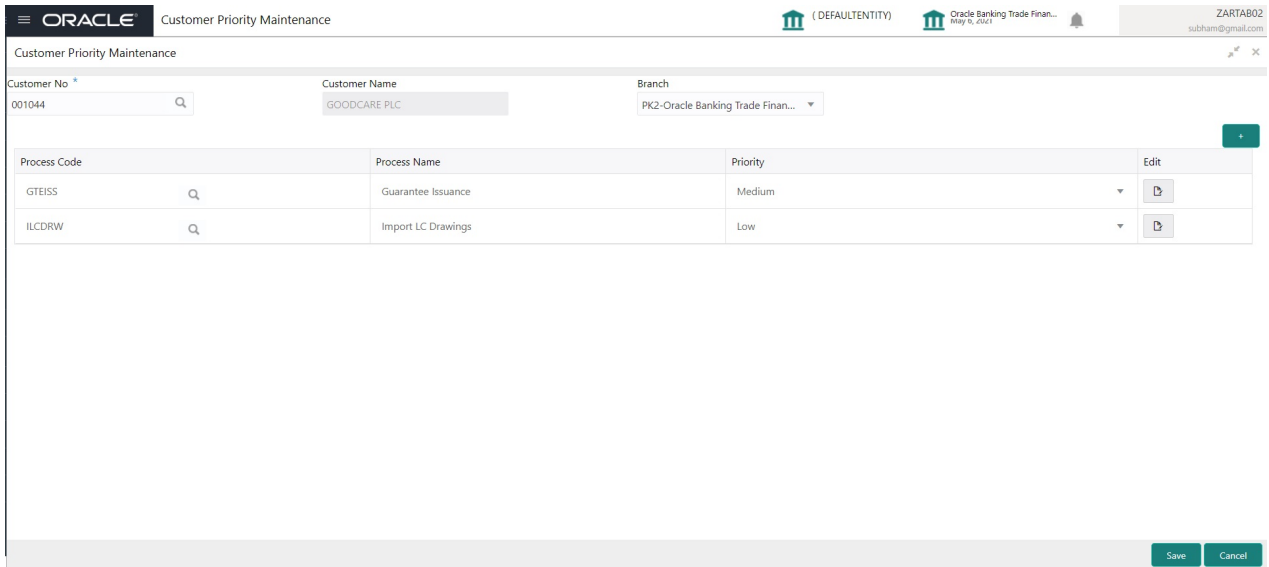
The screenshot shows the Oracle Core Maintenance > Priority Code > Customer Priority Maintenance screen. The dashboard includes several widgets:

- Priority Summary:** A table with columns for Branch, Process Name, Stage Name, and No of High Priority. It shows 'No data to display'.
- Draft Confirmation Pending:** A table with columns for Process Reference Number, Customer Id, and Applicant. It shows 'No data to display'.
- Hand-off Failure:** A table with columns for Process Reference Number, Branch, and Process Name. It lists items like 'Islamic Import LC D' and 'GuaranteeAdv Ame'.
- Pending Exception Approval:** A widget showing a count of (0) pending approvals.
- SLA Status Summary:** A donut chart showing the distribution of SLA status: 29 items are 'Within SLA' (green), 0 are 'Nearing SLA' (orange), and 0 are 'SLA breached' (red).

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



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



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

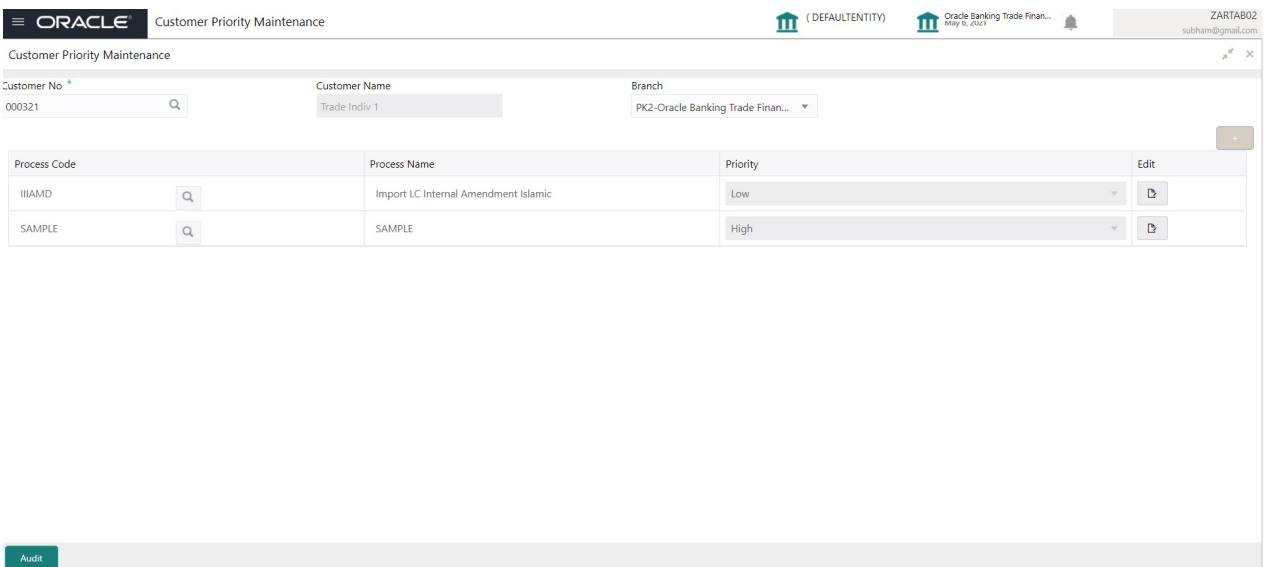
The user can view the summary of customer priority maintained in the form of tiles. The user can view the customer priority in the ‘List’ or ‘Table’ form, by clicking the List or Table icon on the top right corner of the screen.

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

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.

- 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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