

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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1. Preface

1.1 Introduction

This user manual is designed to help you quickly get acquainted with Customer Priority Maintenance process in Oracle Banking Trade Finance Process Management.

1.2 Audience

This manual is intended for the following User/User Roles:

- Oracle Implementers
- Customer Service Representatives (CSRs)
- Oracle user

1.3 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>.

Access to Oracle Support

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1.4 Organization

This manual is organized into the following chapters:

- Preface gives information on the intended audience, structure, and related documents for this User Manual.
- The subsequent chapters provide an overview to the module.

1.5 Related Documents

- Getting Started User Guide
- Common Core User Guide

1.6 Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to 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.

1.7 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.
<i>italic</i>	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.

1.8 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.

1.9 Glossary of Icons

This User Manual may refer to all or some of the following icons.

Icons	Function
	Exit
	Add row
	Delete row
	Option List

2. 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:

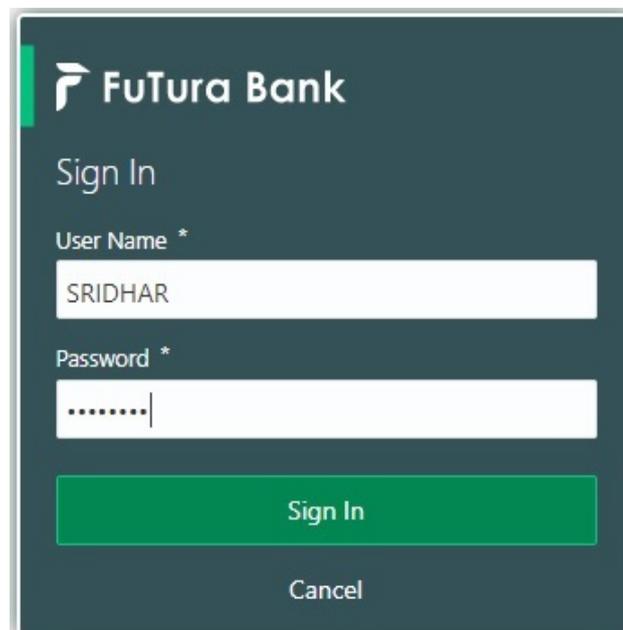
[2.1 Create Customer Priority](#)

[2.2 View Customer Priority Maintenance](#)

2.1 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 these fields are two buttons: a green 'Sign In' button and a 'Cancel' button.

- 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 a user named SRIDHAR. The dashboard includes several widgets:

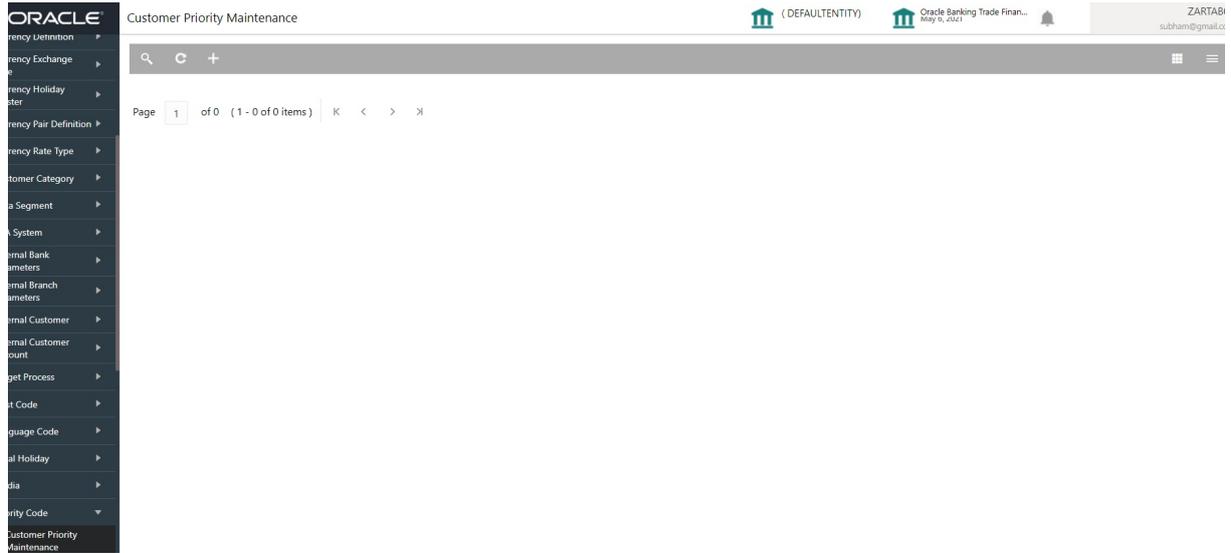
- High Value Transactions:** A bubble chart showing transactions for GBP and EUR across a range of 0 to 12.
- High Priority Tasks:** A table listing tasks such as 'Import Documentary Collections' and 'Export LC Advising' with columns for Branch, Process Name, and Status.
- Priority Summary:** A table showing summary data for various processes and branches.
- Pending Exception Approval:** A table with a search filter and columns for Customer Name, Stage Name, Process Reference Number, Process Name, Branch Name, and Currency. It lists entries like 'Amount Block Exception Approval' and 'Limit Earmarking Exception Approval'.
- SLA Status Summary:** A widget with a dropdown menu and a gear icon.

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

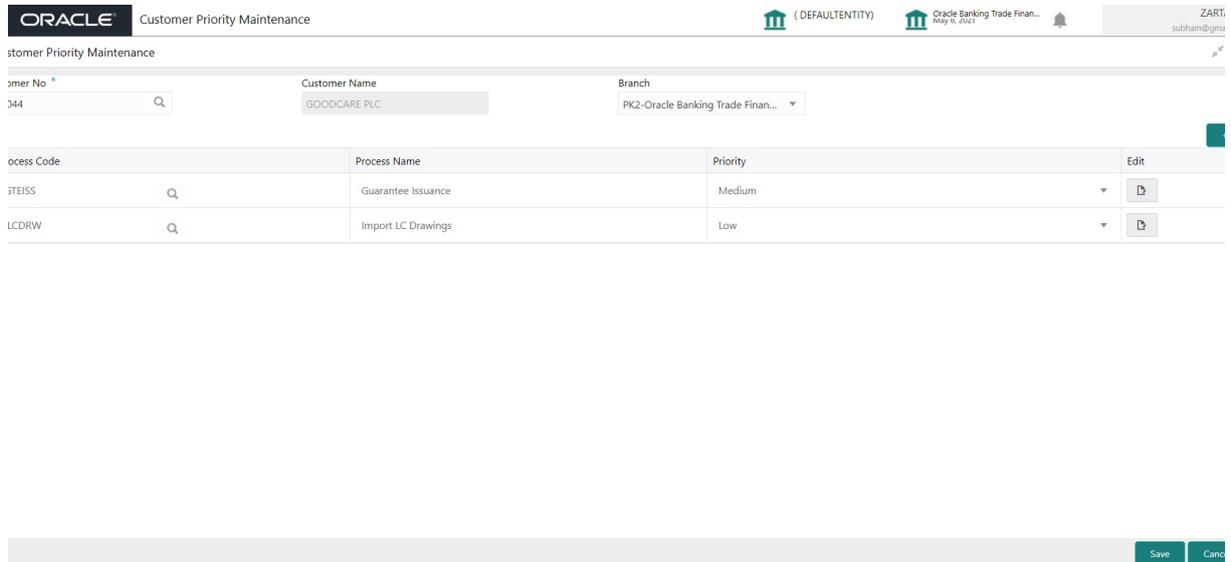
The screenshot shows the Oracle dashboard for a user named ZART. The dashboard includes several widgets:

- 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 entries like 'Islamic Import LC D' and 'GuaranteeAdv Ame'.
- Pending Exception Approval:** A widget showing '(0)' items.
- SLA Status Summary:** A donut chart showing the status of SLA breaches. The chart is mostly red, indicating 'SLA breached'.

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.

2.1.0.1 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.

2.2 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

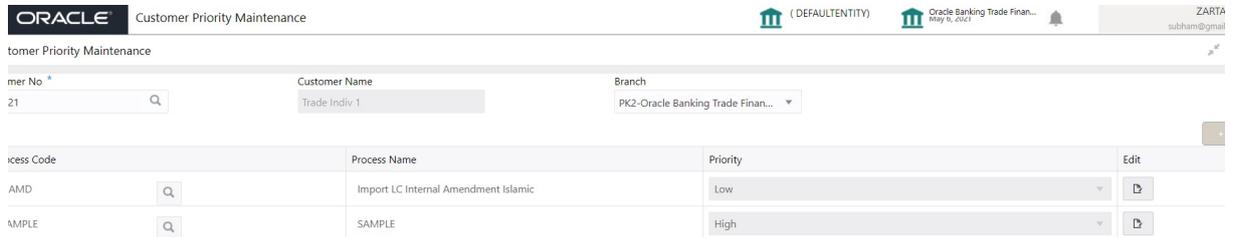
Customer No. 21 Customer Name Trade Indiv 1 Branch PK2-Oracle Banking Trade Finan...

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

edit

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



Process Code	Process Name	Priority	Edit
AMD	Import LC Internal Amendment Islamic	Low	
SAMPLE	SAMPLE	High	

2.2.0.1

2.2.0.2 **Audit**

Maker

 OBTFPM09

 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.
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.

2.2.1

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