

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>.

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Oracle customers that have purchased support 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 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
<b>boldface</b>	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

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## 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:

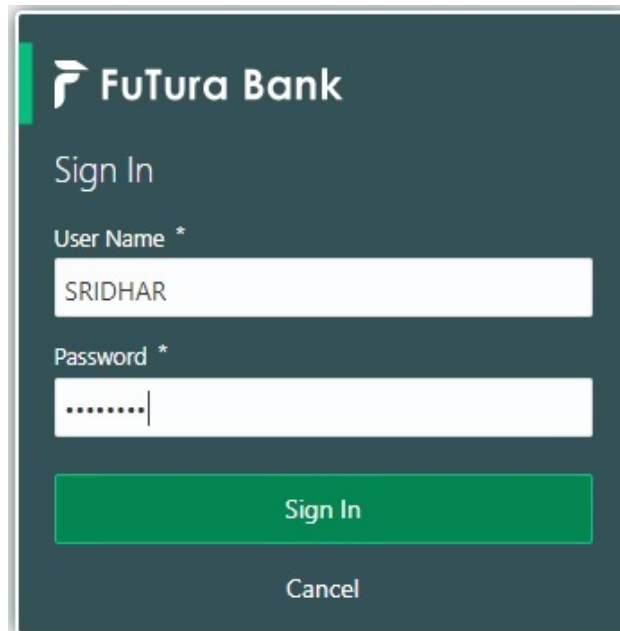
### [2.1 Create Customer Priority](#)

### [2.2 View Customer Priority Maintenance](#)

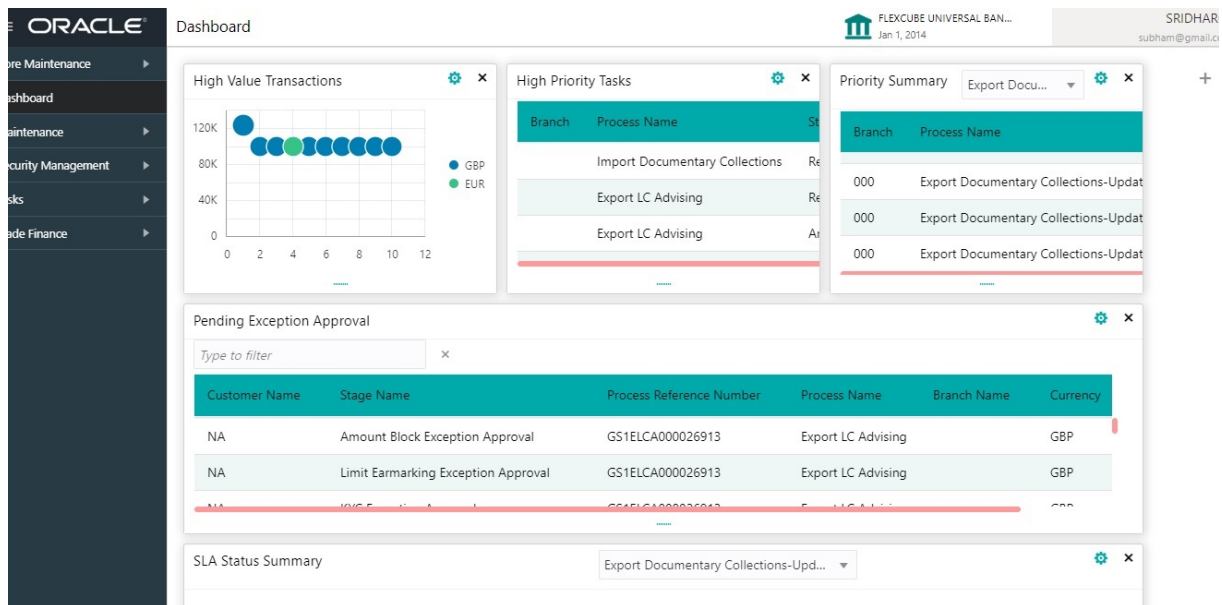
## 2.1 Create Customer Priority

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:

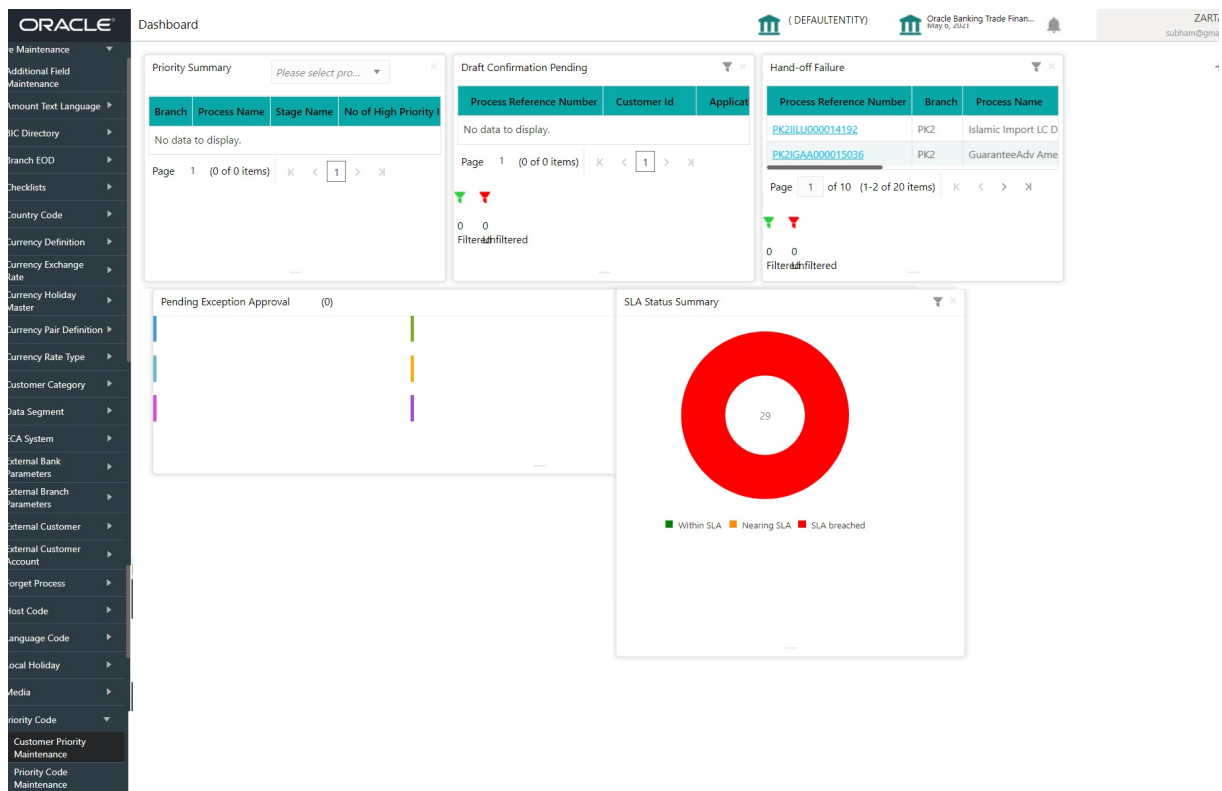
1. Using the entitled login credentials for Registration stage, login to the OBTFPM application.

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.

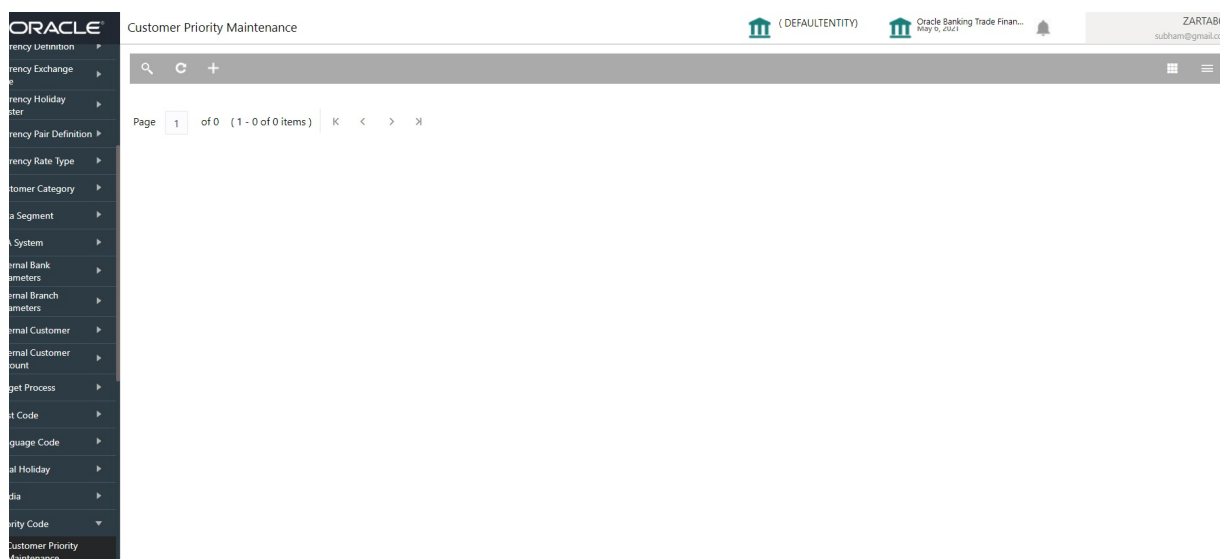
- On login, user must be able to view the dashboard screen with widgets as mapped to the user.



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



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.

### 2.1.1 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.

- 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.

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

Oracle 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]
SMPLE	SAMPLE	High	[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 three dots on the right corner of the tile, 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.

**ORACLE** Customer Priority Maintenance ( DEFAULTTENITY ) Oracle Banking Trade Finan... May 10, 2021 ZARTA subham@gmail

Customer Priority Maintenance

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

Process Code	Process Name	Priority	Edit
AMD <input type="text"/>	Import LC Internal Amendment Islamic	Low <input type="text"/>	<input type="button" value="Edit"/>
SAMPLE <input type="text"/>	SAMPLE	High <input type="text"/>	<input type="button" value="Edit"/>


## 2.2.1 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.
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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