

# Oracle® Banking Microservices Architecture

## Small and Medium Enterprise 360 User Guide



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## Purpose

This guide provides the detailed information about the Small and Medium Enterprise (SME) 360 feature.

## Audience

This guide is intended for the Relationship Managers (RM) in the SME division of the bank.

## Documentation Accessibility

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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.

## 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 or the glossary.
<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.

## Related Resources

For more information, see these Oracle resources:

- *Getting Started User Guide*
- *SME Onboarding User Guide*

## 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.

## Acronyms and Abbreviations

The following acronyms and abbreviations are used in this guide:

**Table**    **Acronyms and Abbreviations**

Acronym/ Abbreviation	Description
<b>CIF</b>	Customer Information File
<b>SME</b>	Small and Medium Enterprise

## Basic Actions

Most of the screens contain icons to perform all or a few of the basic actions. The actions which are called here are generic, and it varies based on the usage and the applicability. The table below gives a snapshot of them:






**Table Common Icons and its Definitions**

Icon	Description
<b>Close</b>	Click <b>Close</b> to exit the screen.

## Symbols and Icons

The following are the symbols you are likely to find in this guide:

**Table Symbols and Icons**

Symbol	Function
	Close icon
	Filter icon
	Maximize icon
	Minimize icon
	Product 360 View

# 1

## Overview - SME 360

This topic describes the overview of the Small and Medium Enterprise (SME) 360 feature.

Small and Medium Enterprise 360 or SME 360 is an essential feature, which is designed to simplify the work of RM in the bank and save a significant amount of time. The customer-specific information displayed in SME 360 enables the RM to stay up to date about their customers and perform actions that have strict deadlines.

Some of the most required information displayed in SME 360 are:

- **Customer Demographics** of a corporate customer. For more information, refer to the **Customer Demographic Sections** table.
- **Portfolio** across all the products subscribed by the customer
- **Actions** of pending activities
- **Sales Opportunity** for automatic debit of loans received by the customer
- **Service Requests** raised by the customer that are yet to be addressed
- **My Diary** is a to-do list to plan and track the activities for RM

**Table 1-1 Customer Demographic Sections**

Sections	Description
<b>Demographic Details</b>	This section provides the basic demographic information about the customer.
<b>Stakeholders</b>	This section provides the key stakeholders for the business.
<b>Financial Profile</b>	This section provides the financial details for the business.
<b>Industry wise presence</b>	This section provides the different industry sectors that the business caters to.
<b>Balance Sheet</b>	This section provides the balance sheet details for the business.
<b>Country Wise Presence</b>	This section provides the list of countries where the business is operational.
<b>Subsidiaries</b>	This section provides a view of the SME's business hierarchy.
<b>Rating</b>	This section provides the credit ratings for the SME provided by rating agencies/internal ratings provided by the bank.

# 2

## Get Started

This topic describes the detailed information on the various tiles/sections of the SMB 360 page.

SME 360 enables the RM to have a consolidated view of all the necessary information about the SME with an option to drill down into the specific product dashboards for details of the customer's portfolio. The SME 360 page can be viewed using the *Customer Search* option.

This topic contains the following subtopic:

- [SME 360 Page](#)  
This topic provides systematic instructions to view the customer details in SME 360 page.

### 2.1 SME 360 Page

This topic provides systematic instructions to view the customer details in SME 360 page.

Before you begin, log in to the application home page. For information on how to log in, refer to *Getting Started User Guide*.

#### Note:

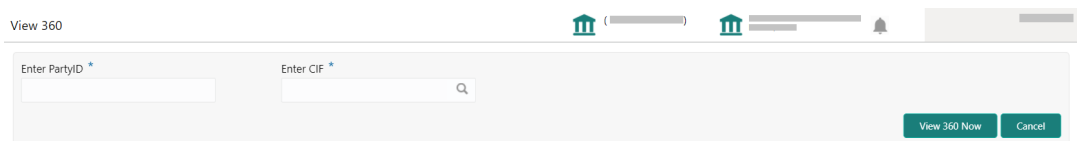
- User should have required access to view a party within a customer access group as relationship. For more details, refer **Oracle Banking Party Configuration User Guide**.
- User should have required Personal Identifiable Information (PII) access to view individual stakeholders if PII fields are configured. For more details, refer **Oracle Banking Party Configuration User Guide**.

#### Note:

The fields marked as **Required** are mandatory.

1. On the Home page, click **Party Services**. Under **Party Services**, click **View 360**.  
The **View 360** screen displays.

**Figure 2-1 View 360**



2. On the **View 360** screen, specify the fields. For more information on fields, refer to the field description table.



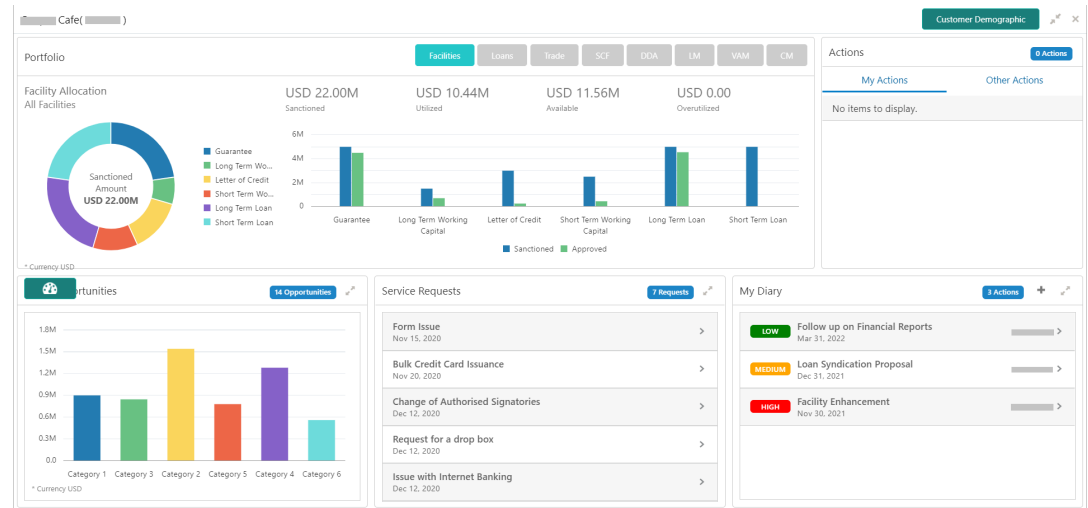
**Table 2-1 View 360 - Field Description**

Field	Description
Enter Party ID	Specify the party ID of the desired customer.
Enter CIF	Specify the CIF of the desired customer.

3. Click **View 360 Now**.

The **SME 360** page displays.

**Figure 2-2 SME 360**



# 3

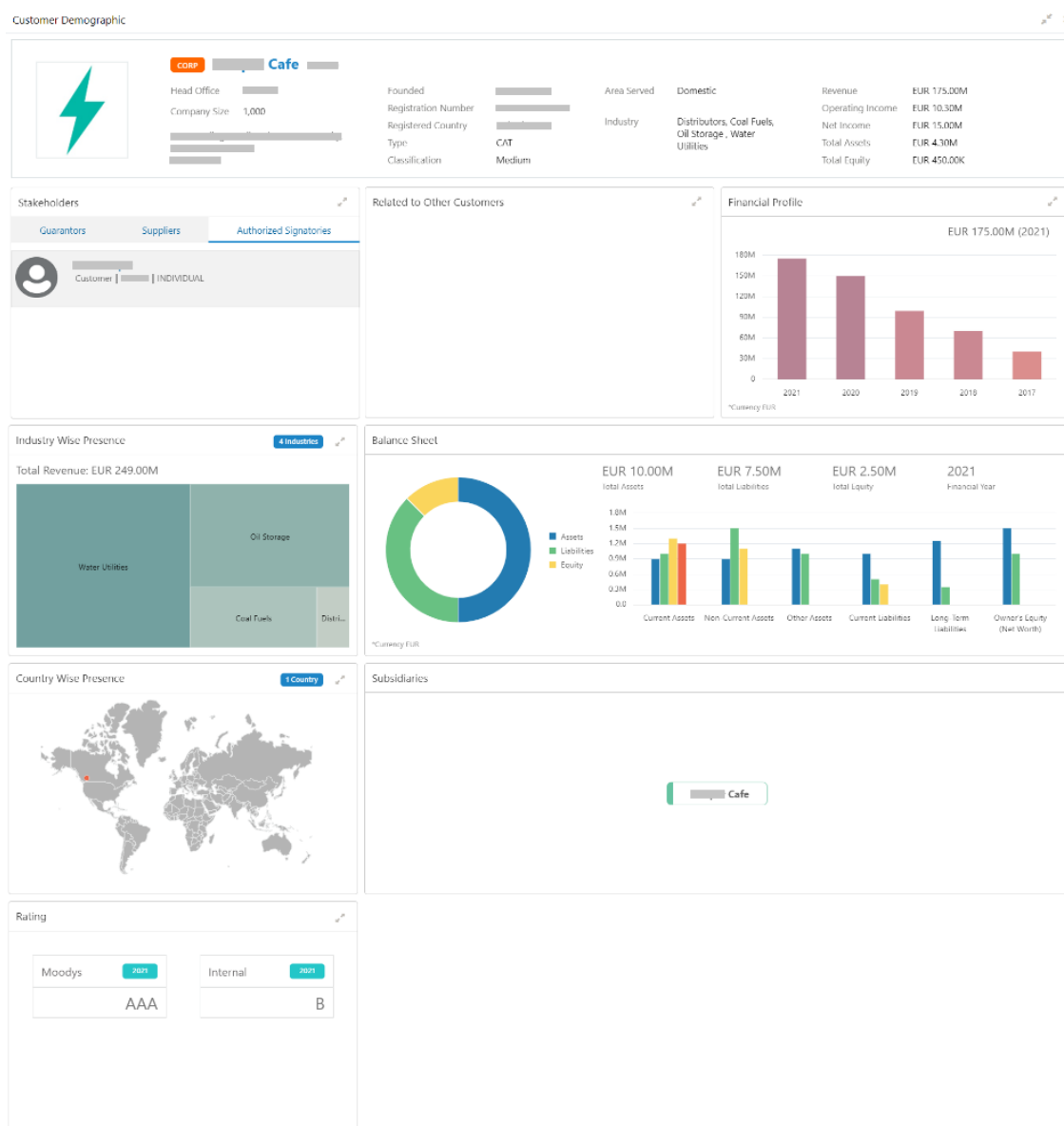
## Customer Demographics

This topic describes the basic details about the SME's business.

The **Customer Demographic** information can be seen by clicking **Customer Demographic** on the SME 360 page.

The following figure shows the various sections on this page.

**Figure 3-1 Customer Demographic**



The following table describes the various sections on the **Customer Demographic** page.

**Table 3-1 Customer Demographic Sections**

Sections	Description
<b>Demographic Details</b>	Contains the following basic details of the business: <ul style="list-style-type: none"> <li>• Logo</li> <li>• Name</li> <li>• Address</li> <li>• Contact details</li> <li>• Registration details</li> <li>• Classification</li> <li>• Industry sector</li> <li>• Revenue</li> <li>• Operating income</li> <li>• Assets</li> <li>• Equity</li> </ul>
<b>Stakeholders</b>	The key stakeholders for the business are as follows: <ul style="list-style-type: none"> <li>• Management team</li> <li>• Sponsors</li> <li>• Guarantors</li> <li>• Suppliers</li> <li>• Bankers</li> <li>• Insurers</li> </ul>
<b>Financial Profile</b>	Financial profile of the customer that includes: <ul style="list-style-type: none"> <li>• Balance sheet details</li> <li>• Revenue</li> <li>• Operating profit</li> <li>• Net profit</li> <li>• Return on investment</li> <li>• Return on equity</li> <li>• Return on asset</li> </ul>
<b>Industry Wise presence</b>	Different industry sectors to which the SME caters.
<b>Balance Sheet</b>	Balance sheet details for the SME – Asset, Liability, and Owner's Equity.
<b>Country Wise Presence</b>	List of countries where the business is operational.
<b>Subsidiaries</b>	A view of the SME's business hierarchy including all the subsidiary companies.
<b>Rating</b>	Credit rating for the SME provided by external rating agencies/internal rating provided by the bank.

### Basic Details

This section contains the following basic details of the SME:

- Name
- Address
- Contact information
- Industry segment
- Areas served
- Revenue
- Operating income

- Net income

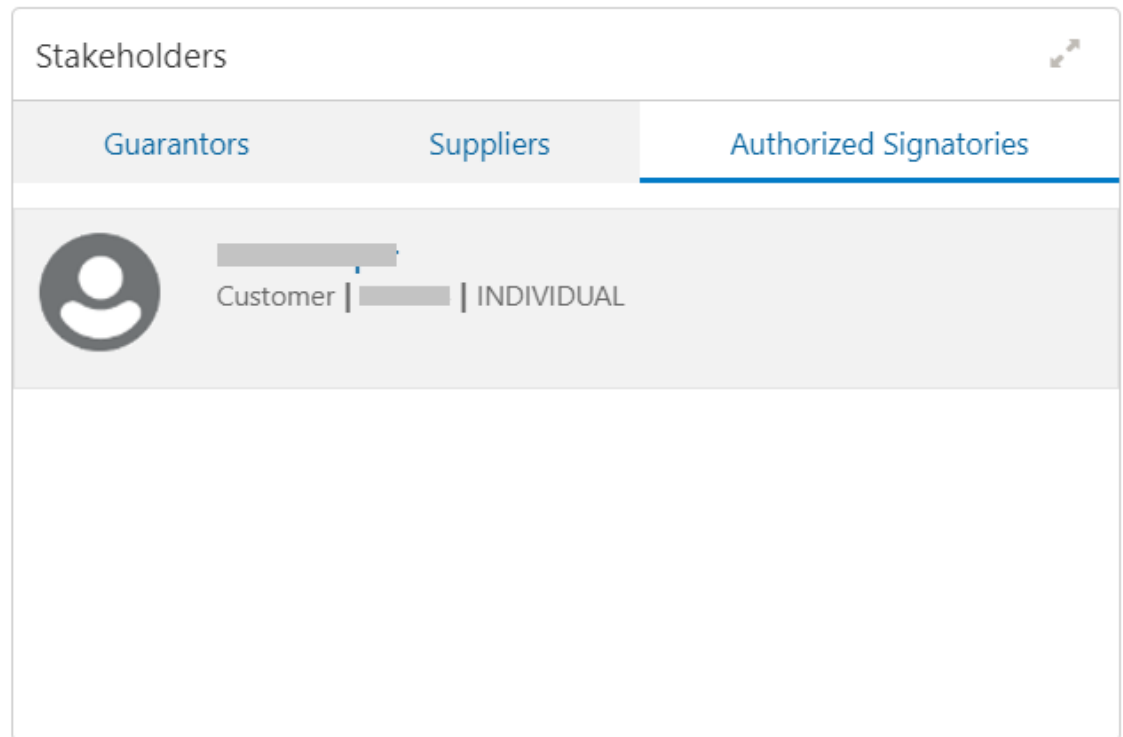
**Figure 3-2 Basic Details**



### Stakeholder Information

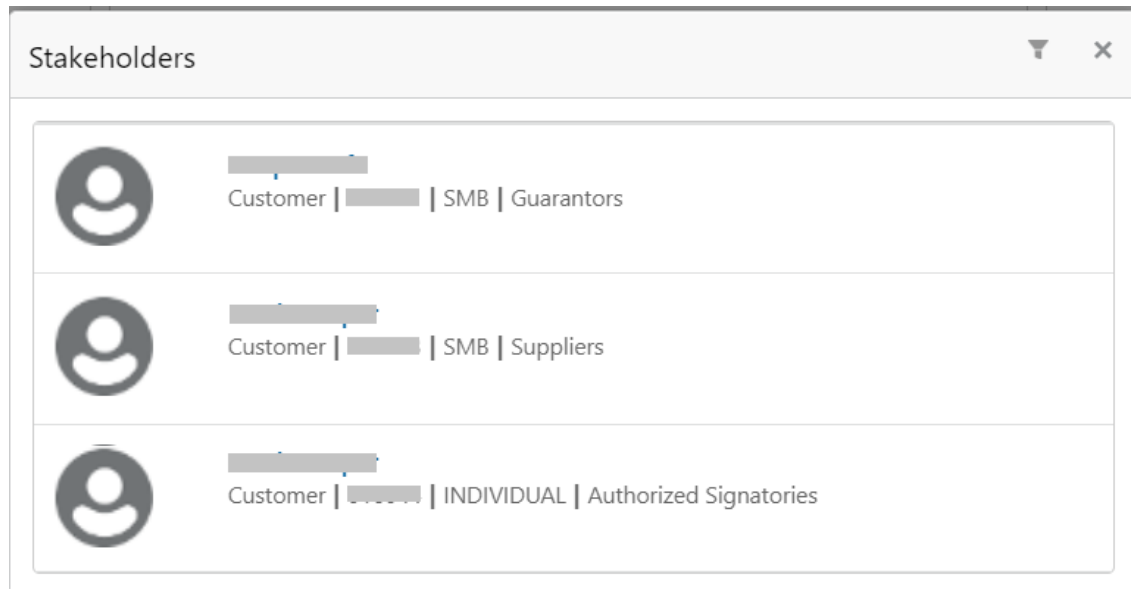
This widget contains the details of the key stakeholders for the SME.

**Figure 3-3 Stakeholders**



The following types of stakeholders are displayed in this tile. Users can select the respective tab to view the details.

- Guarantors
- Suppliers
- Authorized Signatories

**Figure 3-4 Stakeholders Expanded View**

You can click on the individual stakeholder, to view the stakeholder details in 360 view. If the stakeholder is a non-customer, the system will launch the **Stakeholder Summary** screen to view non-customer stakeholder details.

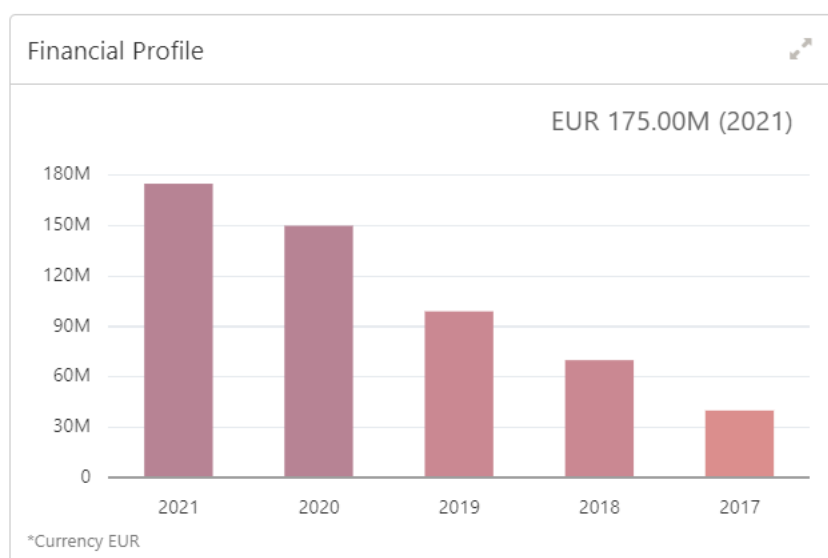
**Figure 3-5 Stakeholder Summary**

The screenshot shows the "Stakeholder Summary" screen. At the top, there is a header bar with a person icon and fields for Date of birth, Gender, and Marital Status. Below this, the screen is divided into several sections:

- General Information:** Includes ID Type (Passport), ID Number, Citizenship by Birth, Nationality, Birth Country, Country of Residence, and Resident Status (Resident).
- Address and Contact:** Includes No of addresses, Mobile, and Email.
- Related to Other Customers:** A tabbed interface with tabs for Guarantors, Power Of Attorney, and Household. The Guarantors tab is active, showing a list of related customers, including one labeled "Cafe" with a person icon and a text label "Customer | [redacted]".
- KYC:** A section for Know Your Customer details, showing Status (Non-Compliant) and KYC Last Updated Date.

### Financial Profile

This widget displays the financial details like Revenue, Operating Income, and Net Income for the SME.

**Figure 3-6 Financial Profile****Figure 3-7 Financial Expanded View**

Financial Profile			
Financial Year	Revenue	Operating Income	Net Income
2021	EUR 175.00M	EUR 10.30M	EUR 15.00M
2020	EUR 150.00M	EUR 87.00M	EUR 107.00M
2019	EUR 99.00M	EUR 7.70M	EUR 92.00M
2018	EUR 70.00M	EUR 20.00M	EUR 99.00M
2017	EUR 40.00M	EUR 25.00M	EUR 76.00M

For more information on the columns in the expanded view, refer to the Column Description table.

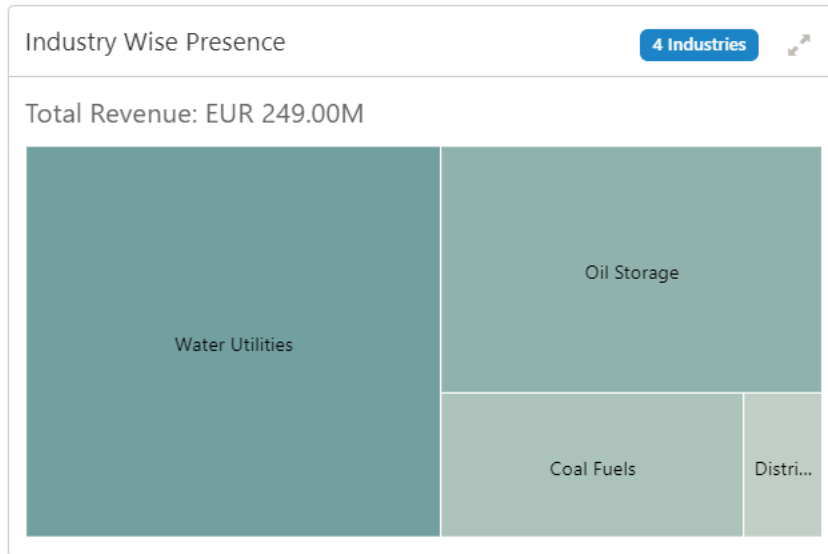
**Table 3-2 Financial Profile - Column Description**

Column	Description
<b>Financial Year</b>	Displays the financial year for which the details are displayed.
<b>Revenue</b>	Displays the revenue of the SME customer in the financial year.
<b>Operating Income</b>	Displays the operating income of the SME customer in the financial year.
<b>Net Income</b>	Displays the net income of the SME customer in the financial year.

## Industry Wise Presence

This widget displays the different industry sectors to which the SME caters to.

**Figure 3-8 Industry Wise Preference**



**Figure 3-9 Industry Wise Presence -Expanded View**

Industry Wise Presence					
Coal Fuels					
Sector	Group	Industry	Revenue	Operating Profit	Revenue Period
Energy	Energy	Oil, Gas Fuels	EUR 35.00M	EUR 15.00M	Q1 2021
Energy	Energy	Oil, Gas Fuels	EUR 30.00M	EUR 10.00M	Q4 2020
Oil Storage					
Water Utilities					

Close

For more information on the columns in the expanded view, refer to the Column Description table:

**Table 3-3 Industry Wise Presence - Column Description**

Column	Description
<b>Sector</b>	Displays the industry sector in which the SME customer is present.
<b>Group</b>	Displays the respective business group.

**Table 3-3 (Cont.) Industry Wise Presence - Column Description**

Column	Description
<b>Industry</b>	Displays the industry for which the details are displayed.
<b>Revenue</b>	Displays the revenue of the SME customer in the respective industry.
<b>Operating Profit</b>	Displays the operating profit of the SME customer in the respective industry.
<b>Revenue Period</b>	Displays the revenue period for which the revenue and operating profit are displayed.

### Balance Sheet

This widget contains information about the SME's balance sheet.

**Figure 3-10 Balance Sheet**

### Country Wise Presence

This widget displays information about the countries where SMEs have offices.



Figure 3-11 Country Wise Presence

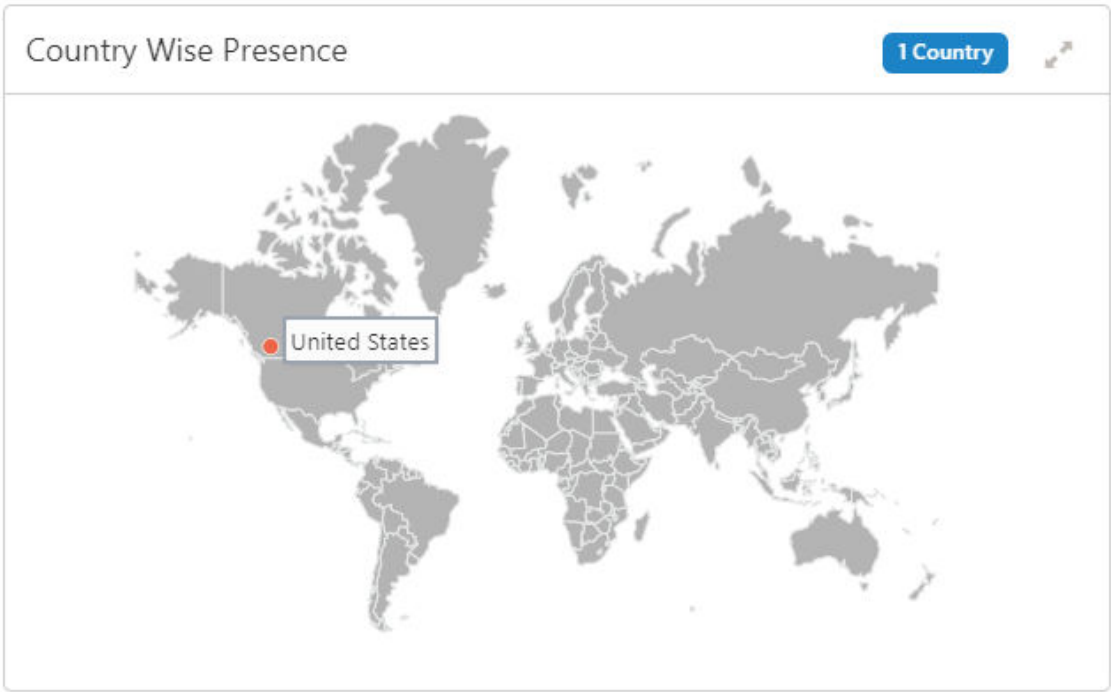
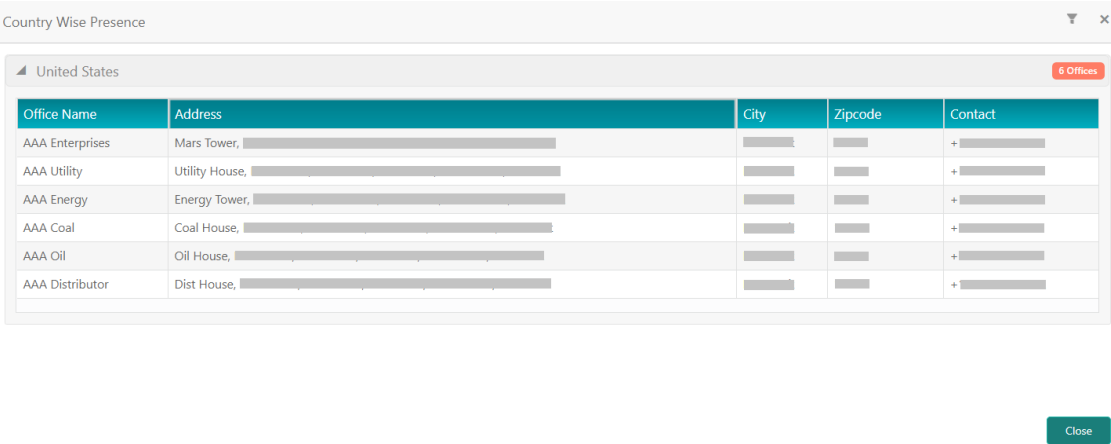


Figure 3-12 Country Wise Presence - Expanded View



For more information on the columns in the expanded view, refer to the Column Description table:

Table 3-4 Country Wise Presence - Column Description

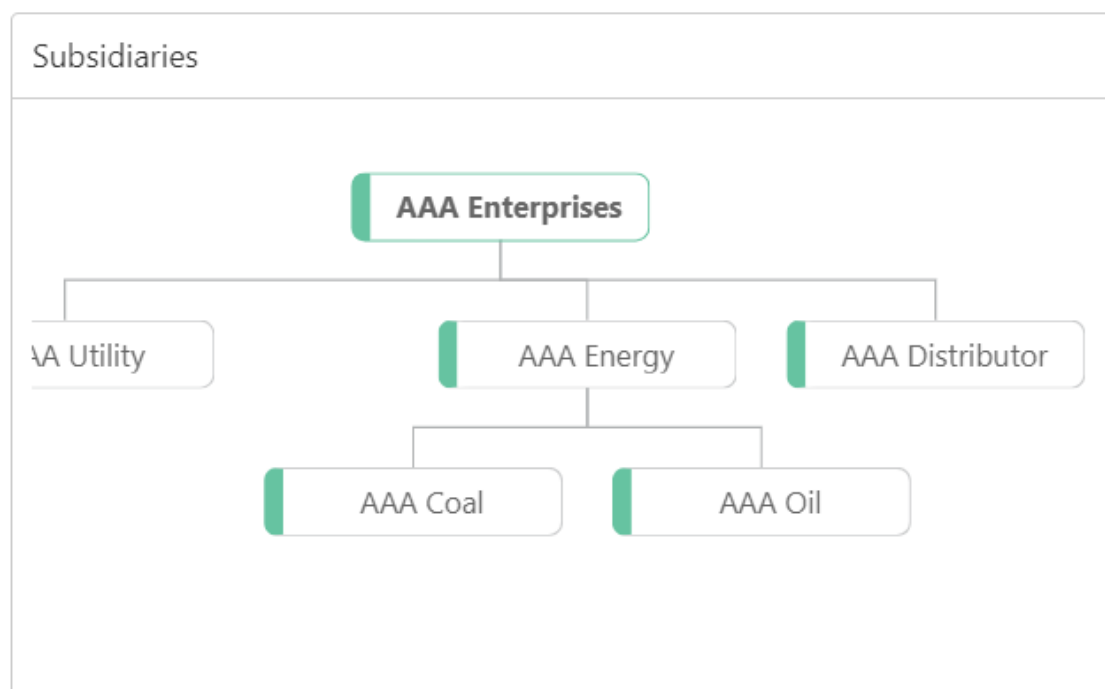
Column	Description
Office Name	Displays the name of the SME office.
Address	Displays the address where the SME customer's office is present.
City	Displays the city where the SME customer's office is present.

**Table 3-4 (Cont.) Country Wise Presence - Column Description**

Column	Description
<b>Zip Code</b>	Displays the zip code of the address.
<b>Contact</b>	Displays the contact number of the SME customer's office.

**Subsidiaries**

This widget contains information about the SME hierarchy and the subsidiary companies.

**Figure 3-13 Subsidiaries****Rating**

This widget contains the credit rating of the SME provided by external credit rating agencies or internal ratings provided by the bank.

**Figure 3-14 Credit Rating**

The figure shows a 'Rating' form with three separate boxes for different agencies. Each box contains the agency name, a '2021' button, and the rating value.

Agency	Year	Rating
Moodys	2021	BB+
Internal	2021	CCC+
Fitch	2021	AAA

**Figure 3-15 Credit Rating - Expanded View**

The figure shows an 'Expanded View' of the credit ratings data in a table format. The table has three columns: Agency Name, Assessment Year, and Rating. The data rows are: Moodys (2021, BB+), Internal (2021, CCC+), and Fitch (2021, AAA). There is a 'Close' button at the bottom right.

Agency Name	Assessment Year	Rating
Moodys	2021	BB+
Internal	2021	CCC+
Fitch	2021	AAA

For more information on the columns in the expanded view, refer to the Column Description table:

**Table 3-5 Credit Ratings - Column Description**

Column	Description
<b>Agency Name</b>	Displays the external agency name which provides the credit rating of the SME customer.
<b>Assessment Year</b>	Displays the year of assessment.
<b>Rating</b>	Displays the credit rating of the SME customer for the assessment year.

# 4

## Portfolio

This topic describes the information on the product portfolio held by the SME customer with the Bank.

The following figure shows the **Portfolio** section.

**Figure 4-1 Portfolio**



The portfolio section contains the following product details:

- Facilities
- Loans
- Trade
- Supply Chain Finance (SCF)
- Liquidity Management (LM)
- Virtual Account Management (VAM)
- Cash Management (CM)



### Note:


The widgets corresponding to the products subscribed by the SME will only be displayed in the **Portfolio** section.

The following options are available on this widget to view the details:

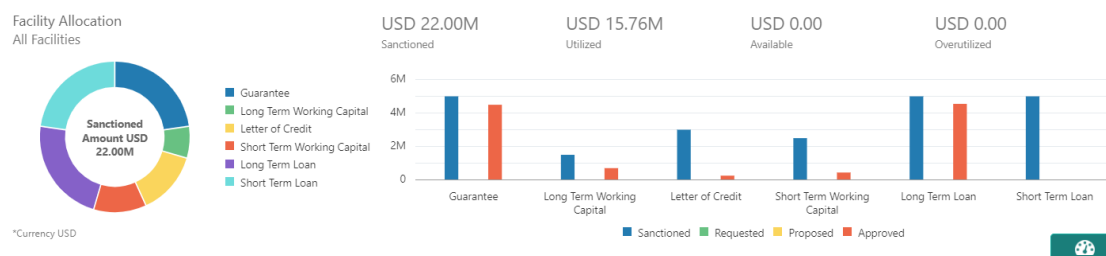
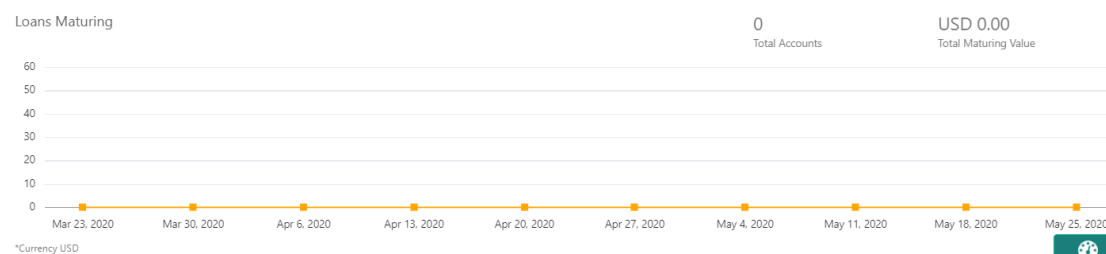
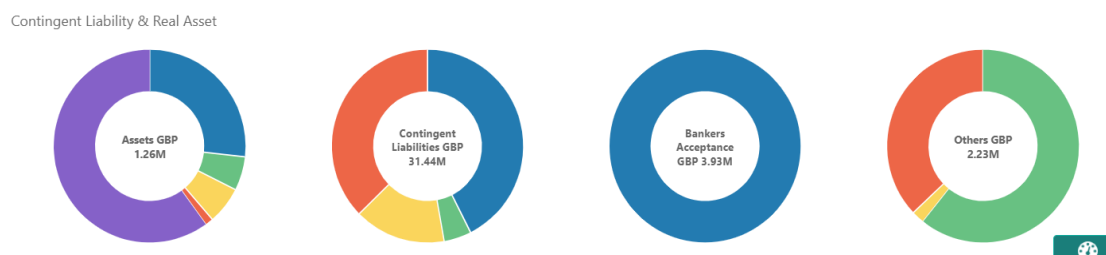
**Table 4-1 Portfolio - Options**

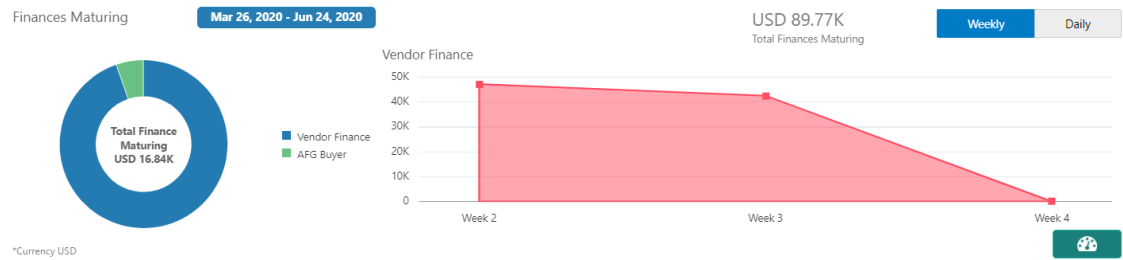
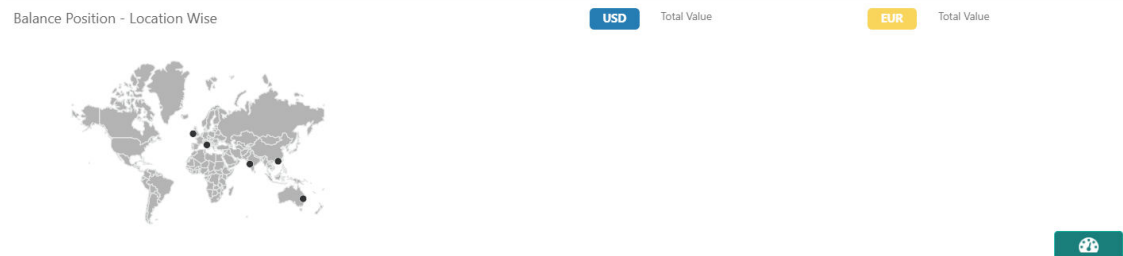
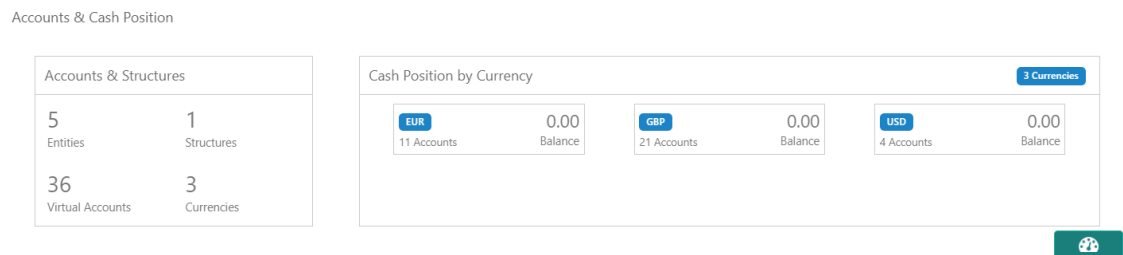
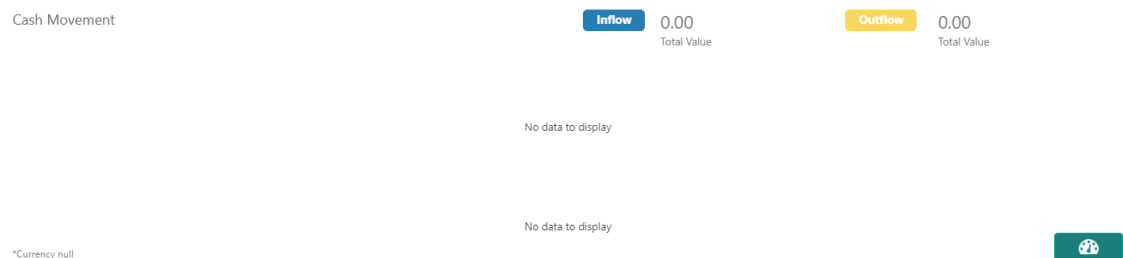
Option/Icon	Description
Product Icons	Click on the respective product button on the top left of the portfolio to navigate to the widget corresponding to that product.

**Table 4-1 (Cont.) Portfolio - Options**

Option/Icon	Description
	Click on this icon present at the right bottom corner of the portfolio to navigate to the selected product 360 view.

The examples of the product 360 view are shown in the following figures.

**Figure 4-2 Facilities****Figure 4-3 Loans****Figure 4-4 Trade**

**Figure 4-5 Supply Chain Finance****Figure 4-6 Liquidity Management****Figure 4-7 Virtual Account Management****Figure 4-8 Cash Management**

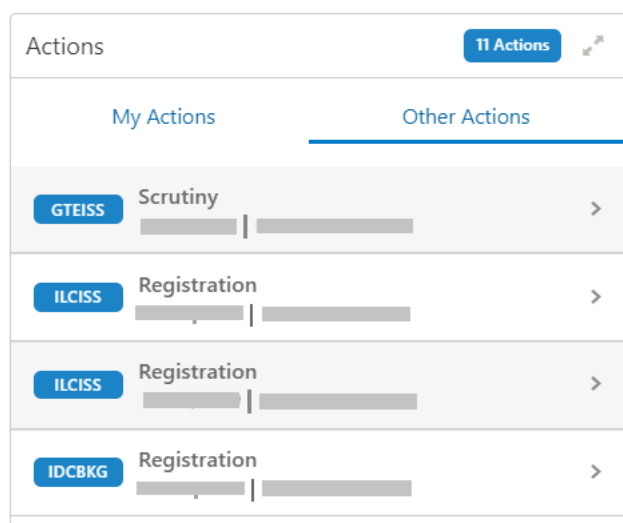
# 5

## Actions

This topic describes the information on the pending actions related to the client.

Actions are displayed corresponding to the product selected in **Portfolio** widget. By periodically monitoring this section, the RM can well prioritize their actions to be performed.

**Figure 5-1 Actions**



Actions are further grouped as:

**Table 5-1 Actions - Tab Description**

Tab	Description
<b>My Actions</b>	Displays the pending actions assigned to the logged-in relationship manager.
<b>Other Actions</b>	Displays the pending actions assigned to the users other than the logged-in relationship manager.

**Figure 5-2 Actions- Expanded View**

Product	Action Name	Date	Severity	Pending with	Description
GTEISS	Scrutiny	Nov 5, 2020	M		Process Name: Guarantee Issuance Process Ref Number: [redacted] Application Number: [redacted] Branch: [redacted] Amount: [redacted]
ILCISS	Registration	Nov 10, 2020	M		Process Name: Import LC Issuance Process Ref Number: [redacted] Application Number: [redacted] Branch: [redacted] Amount: [redacted]

In the expanded view, the records can be filtered on the following parameters:

- **Severity**
- **Pending with** (the user to whom the actions are assigned)

For more information on the columns in the expanded view, refer to the Column Description table.

**Table 5-2 Actions - Column Description**

Column	Description
<b>Product</b>	Displays the product in which there are pending actions.
<b>Action Name</b>	Displays the name of the pending action.
<b>Date</b>	Displays the due date for the pending action.
<b>Severity</b>	Displays the severity of the pending action.
<b>Pending with</b>	Displays the user ID with whom the action is pending.
<b>Description</b>	Displays the details of the pending action.



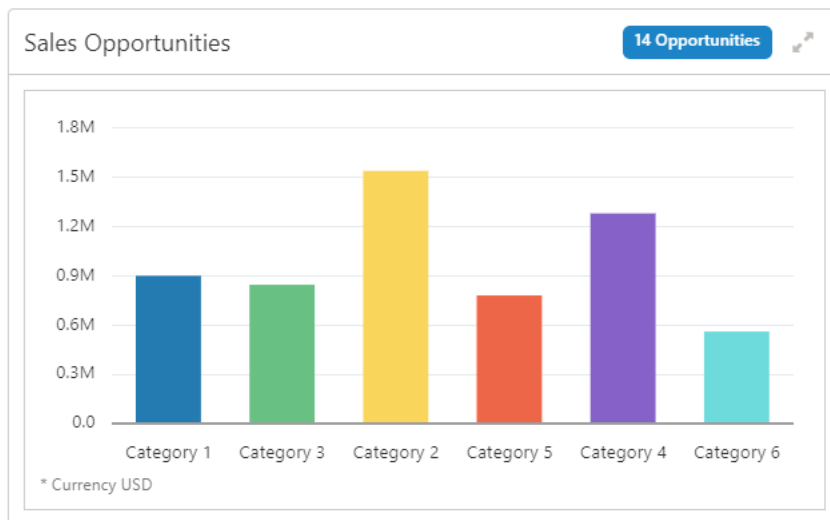
# 6

## Sales Opportunities

This topics describes the information on the sales opportunities (upsell/cross-sell) associated with the SME customer.

This widget helps the RM to better understand the prospects of new business activities with the customer.

**Figure 6-1 Sales Opportunities**



**Figure 6-2 Sales Opportunities - Expanded View**

Expanded view of Sales Opportunities. The table shows details for opportunities under Category 1. Below the table are expandable sections for Category 3 and Category 2.

Opportunity ID	Opportunity	Date Created	Probability	Value	Assigned to	Summary
	Pending Salary Processing	Dec 30, 2020	High			
	Lorem ipsum dolor	Nov 23, 2020	High			

Category 1: 2 Opportunities

Category 3: 3 Opportunities

Category 2: 3 Opportunities

Close

In the expanded view, the records can be filtered based on the following parameters:

- **Product**

- **Date**
- **Value**
- **Probability**

For more information on the columns in the expanded view, refer to the Column Description table:

**Table 6-1 Sales Opportunities - Column Description**

Column	Description
<b>Opportunity ID</b>	Displays the ID of the sales opportunity.
<b>Opportunity</b>	Displays the description of the sales opportunity.
<b>Date Created</b>	Displays the date on which the sales opportunity is created.
<b>Profitability</b>	Displays the profitability of the sales opportunity.
<b>Value</b>	Displays the value of the sales opportunity.
<b>Assigned to</b>	Displays the user ID to which the sales opportunity is assigned.
<b>Summary</b>	Displays the summary of the sales opportunity.

# 7

## Service Requests

This topic describes the information on the outstanding service requests raised by the customer.

By periodically monitoring this widget, the relationship manager can do follow-ups and help address the issues faster.

**Figure 7-1 Service Request**

Service Requests		7 Requests
Form Issue	Nov 15, 2020	>
Bulk Credit Card Issuance	Nov 20, 2020	>
Change of Authorised Signatories	Dec 12, 2020	>
Request for a drop box	Dec 12, 2020	>
Issue with Internet Banking	Dec 12, 2020	>

**Figure 7-2 Service Request - Expanded View**

Service Requests							
Source ID	Reference No	Severity	Date Created	Assigned to	Status	Date Last Updated	Summary
Form Issue	7	HIGH	Nov 15, 2020		OPEN		
Bulk Credit Card Issuance	6	HIGH	Nov 20, 2020		OPEN		
Change of Authorised Signatories	2	LOW	Dec 12, 2020		OPEN		

Close

In the expanded view, the records can be filtered on the following parameters:

- **Severity**
- **Date**
- **Assigned to**
- **Status**

For more information on the columns in the expanded view, refer to the Column Description table:

**Table 7-1 Service Requests - Column Description**

Column	Description
<b>Source ID</b>	Displays the source ID of the service request.
<b>Reference No</b>	Displays the reference number of the service request.
<b>Severity</b>	Displays the severity of the service request.
<b>Date Created</b>	Displays the date on which the service request is created.
<b>Assigned to</b>	Displays the user ID to which the service request is assigned.
<b>Status</b>	Displays the status of the service request.
<b>Date Last Updated</b>	Displays the date on which the service request was last updated.
<b>Summary</b>	Displays the summary of the service request.

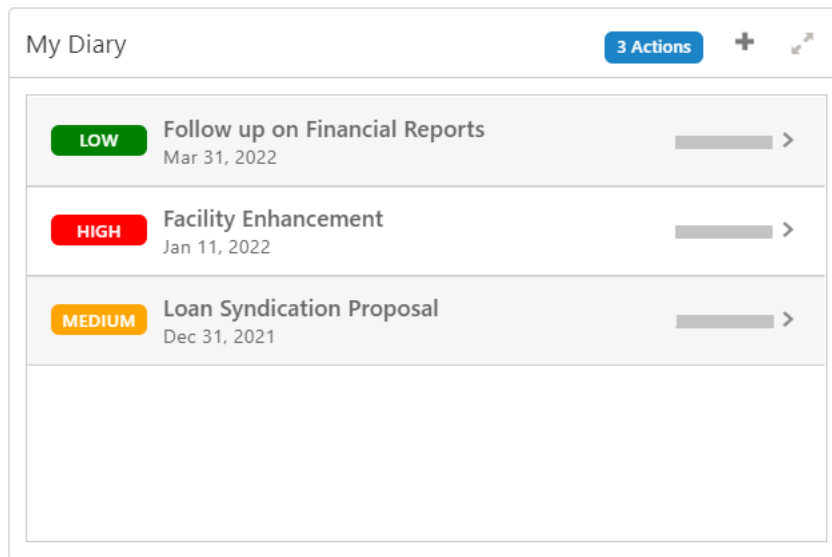
# 8

## My Diary

This topic describes the information to track the to-do list for a relationship manager.

The Relationship Managers can add entries or the tasks that they need to perform in near future. The relationship manager can assign priorities to the tasks, set a due date, and status for the task in this widget.

**Figure 8-1 My Dairy**



**Figure 8-2 My Diary - Expanded View**

The 'My Diary' widget in expanded view shows a table with the following data:

Task Subject	Date Created	Due Date	Priority	Status	Assigned by	Description
Follow up on Financial Reports	Nov 11, 2021	Mar 31, 2022	LOW	OPEN		
Facility Enhancement	Nov 11, 2021	Jan 11, 2022	HIGH	OPEN		
Loan Syndication Proposal	Nov 11, 2021	Dec 31, 2021	MEDIUM	OPEN		

A 'Close' button is located at the bottom right of the widget.

In the expanded view, the records can be filtered on the following parameters:

- **Priority**
- **Due Date**
- **Status**

For more information on the columns in the expanded view, refer to the Column Description table:

**Table 8-1 My Diary - Column Description**

Column	Description
<b>Task Subject</b>	Displays the subject of the task to be completed.
<b>Date Created</b>	Displays the date on which the task is created.
<b>Due Date</b>	Displays the due date for the task to be completed.
<b>Priority</b>	Displays the priority of the task to be completed.
<b>Status</b>	Displays the status of the task to be completed.
<b>Assigned by</b>	Displays the ID of the user who assigned the task.
<b>Description</b>	Displays the description of the task.

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