

# Oracle® Banking Microservices Architecture

## Small and Medium Enterprise 360 User Guide



14.7.4.0.0

G10574-01

June 2024

The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

ORACLE®

Copyright © 2021, 2024, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# Contents

1 Overview - SME 360

---

2 Get Started

---

2.1 SME 360 Page

2-1

3 Customer Demographics

---

4 Portfolio

---

5 Actions

---

6 Sales Opportunities

---

7 Service Requests

---

8 My Diary

---

Index

---

---

# Preface

- [Purpose](#)
- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Conventions](#)
- [Related Resources](#)
- [Screenshot Disclaimer](#)
- [Acronyms and Abbreviations](#)
- [Basic Actions](#)
- [Symbols and Icons](#)

## 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

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**

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.

## 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.

## 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:

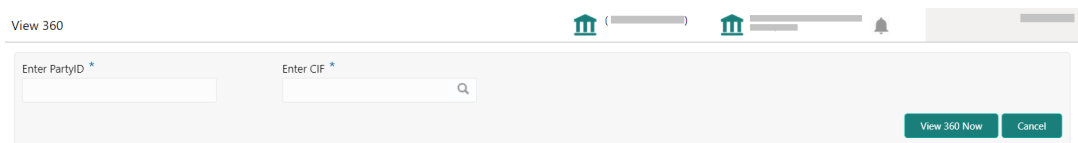
- User should have required access to view a party within a customer access group as relationship. For more details, refer **Oracle Banking Party Configuration User Guide**.
- User should have required Personal Identifiable Information (PII) access to view individual stakeholders if PII fields are configured.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



The screenshot shows the 'View 360' interface. At the top, there are navigation icons for home, a menu, and a notification bell. Below this, there are two search input fields: 'Enter PartyID \*' and 'Enter CIF \*'. The 'Enter CIF \*' field has a magnifying glass icon. At the bottom right, there are two buttons: 'View 360 Now' and 'Cancel'.

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



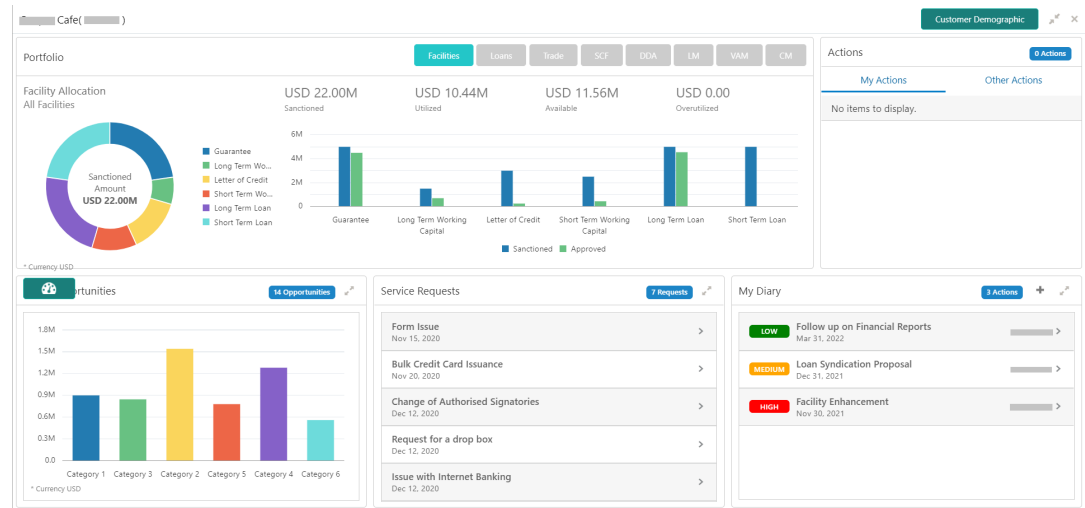
**Table 2-1 View 360 - Field Description**

| 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

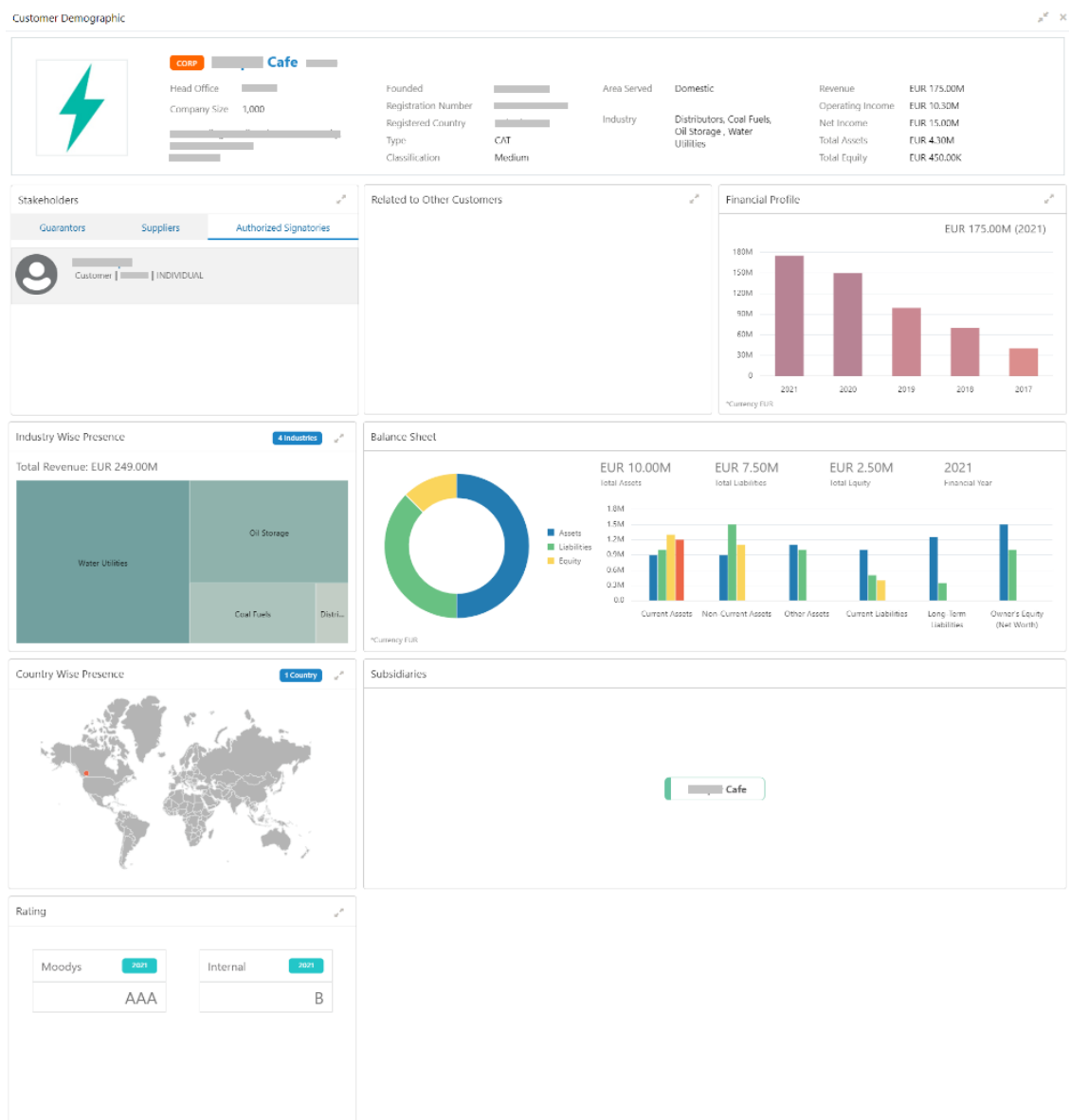
## Customer Demographics

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

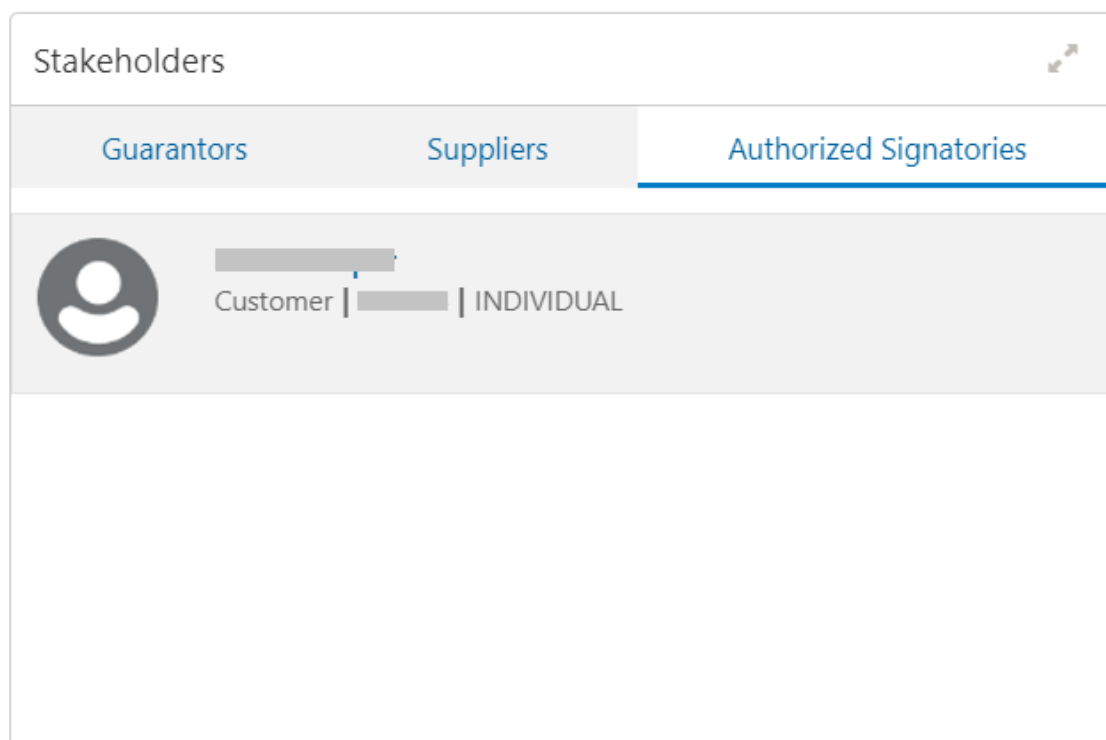
**Figure 3-2 Basic Details**



### Stakeholder Information

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

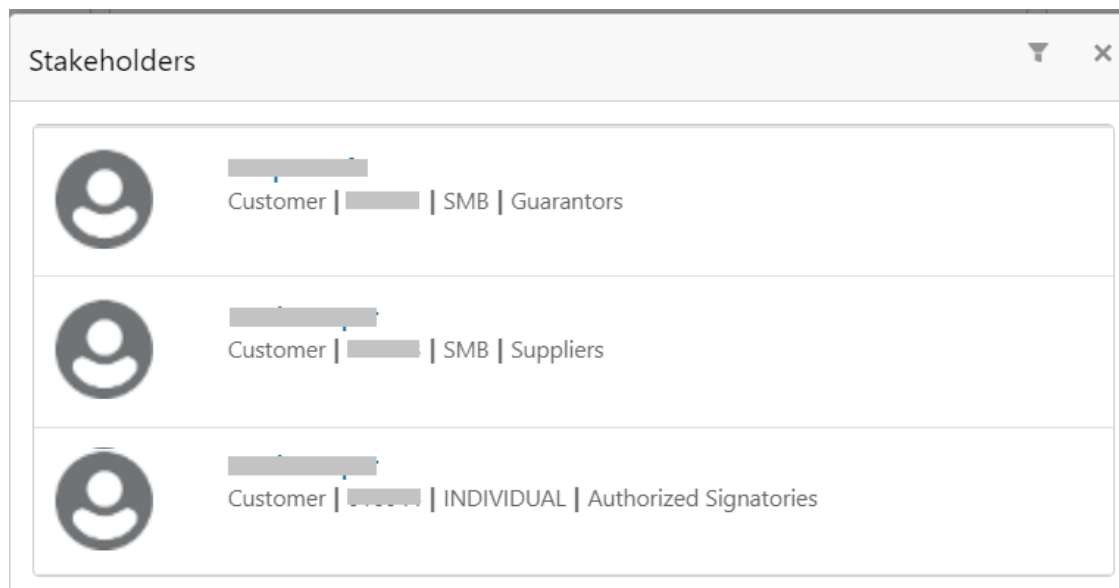
**Figure 3-3 Stakholders**



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

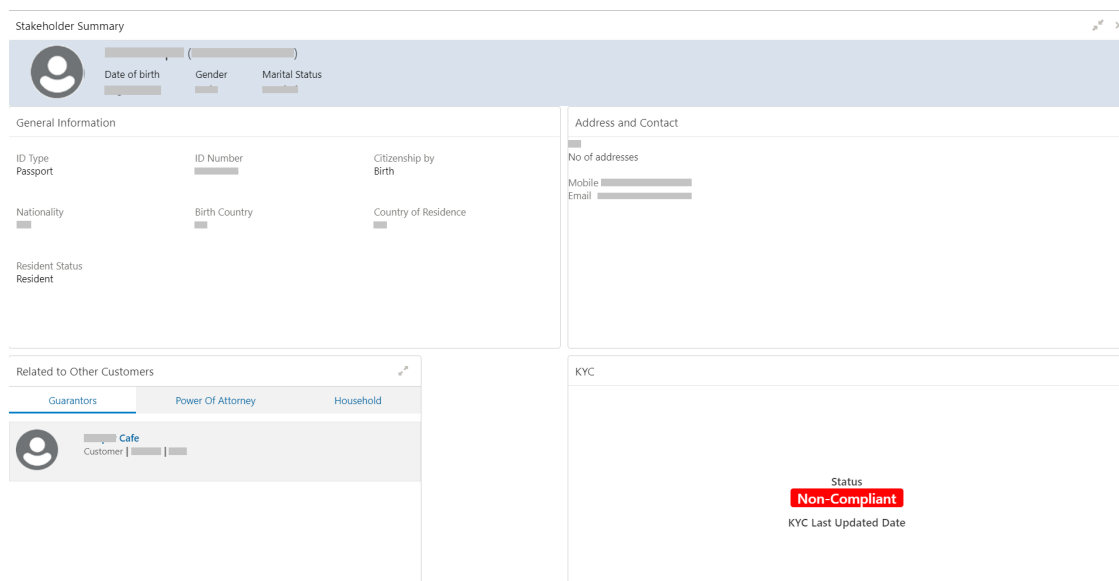
- Guarantors
- Suppliers
- Authorized Signatories

Figure 3-4 Stakeholders Expanded View



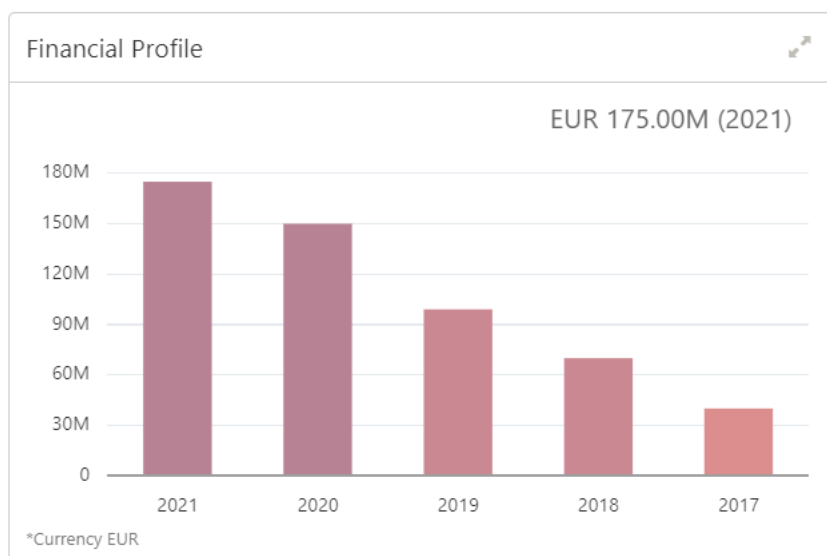
You can click on the individual stakeholder, to view the stakeholder details in 360 view. If the stakeholder is a non-customer, the system will launch the **Stakeholder Summary** screen to view non-customer stakeholder details.

Figure 3-5 Stakeholder Summary



### 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 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.

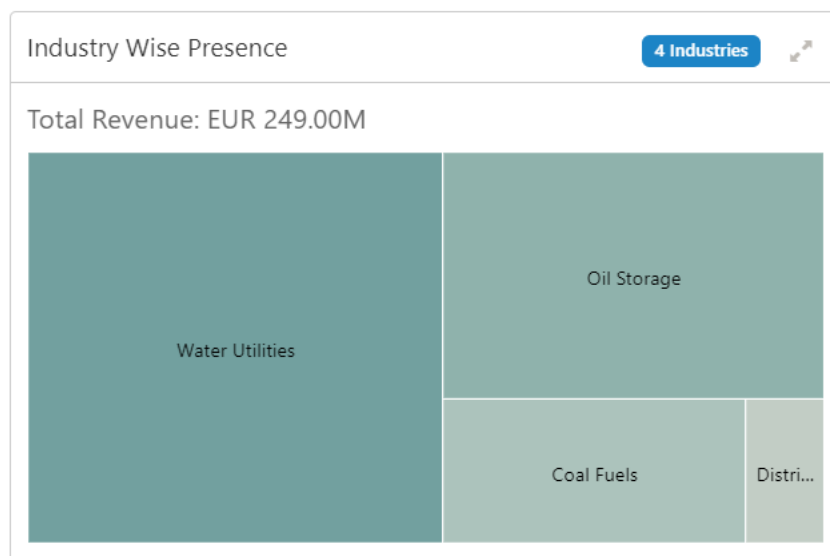
**Table 3-2 Financial Profile - Column Description**

| 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**

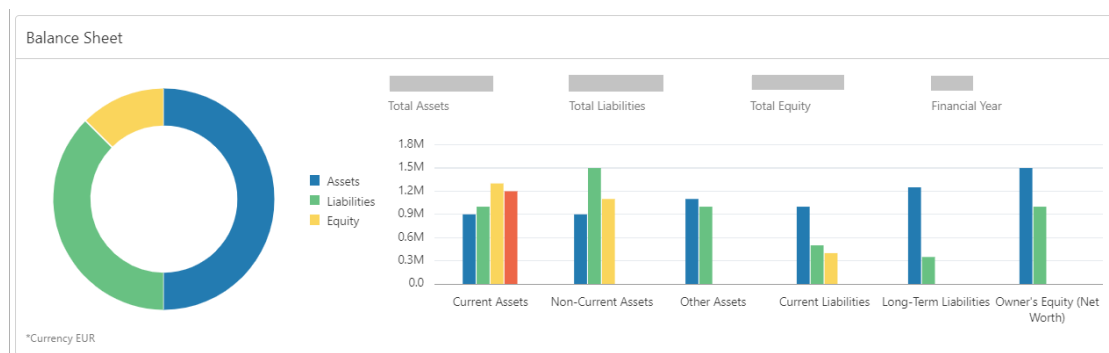
| Column        | Description  |
|---------------|--|
| <b>Sector</b> | Displays the industry sector in which the SME customer is present. |
| <b>Group</b>  | Displays the respective business group.                            |

**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

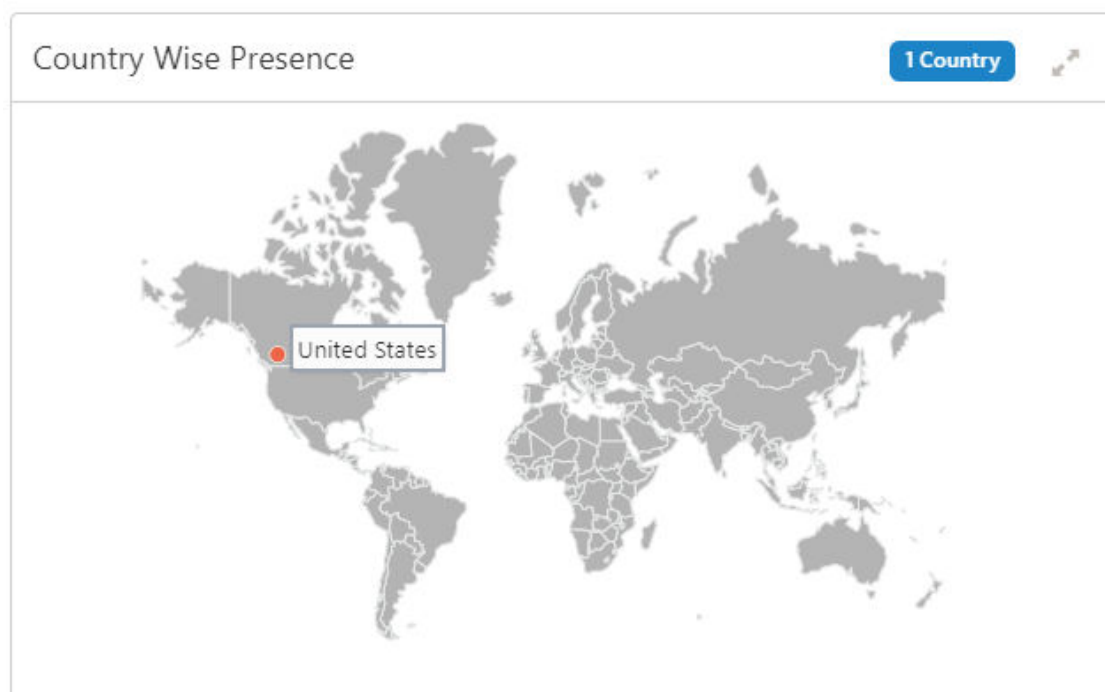
This widget contains information about the SME's balance sheet.

**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**

| Office Name     | Address              | City  | Zipcode | Contact |
|-----------------|----------------------|-------|---------|---------|
| AAA Enterprises | Mars Tower, _____    | _____ | _____   | + _____ |
| AAA Utility     | Utility House, _____ | _____ | _____   | + _____ |
| AAA Energy      | Energy Tower, _____  | _____ | _____   | + _____ |
| AAA Coal        | Coal House, _____    | _____ | _____   | + _____ |
| AAA Oil         | Oil House, _____     | _____ | _____   | + _____ |
| AAA Distributor | Dist House, _____    | _____ | _____   | + _____ |

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

**Table 3-4 Country Wise Presence - Column Description**

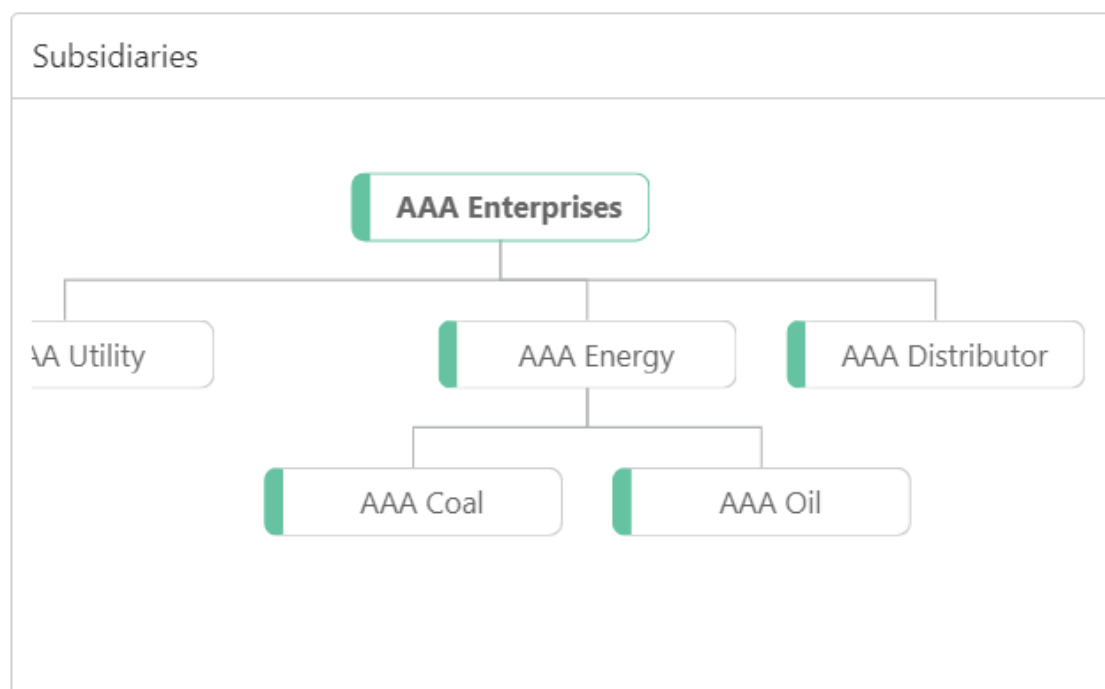
| Column             | Description  |
|--------------------|--|
| <b>Office Name</b> | Displays the name of the SME office.                             |
| <b>Address</b>     | Displays the address where the SME customer's office is present. |
| <b>City</b>        | Displays the city where the SME customer's office is present.    |

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

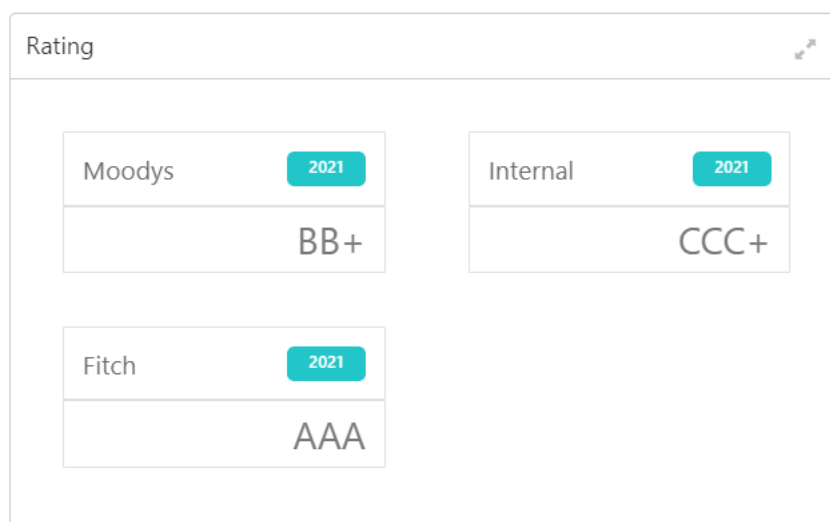
| Column   | Description   |
|----------|---|
| Zip Code | Displays the zip code of the address.                     |
| Contact  | Displays the contact number of the SME customer's office. |

**Subsidiaries**

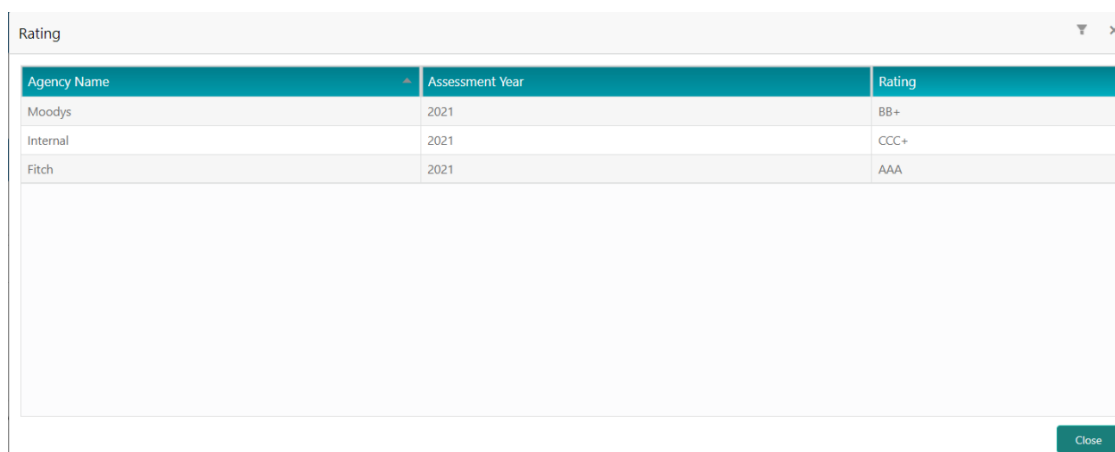
This widget contains information about the SME hierarchy and the subsidiary companies.

**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**


| Agency Name | Assessment Year | Rating |
|-------------|-----------------|--------|
| Moody's     | 2021            | BB+    |
| Internal    | 2021            | CCC+   |
| Fitch       | 2021            | AAA    |

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


| Agency Name | Assessment Year | Rating |
|-------------|-----------------|--------|
| Moody's     | 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**

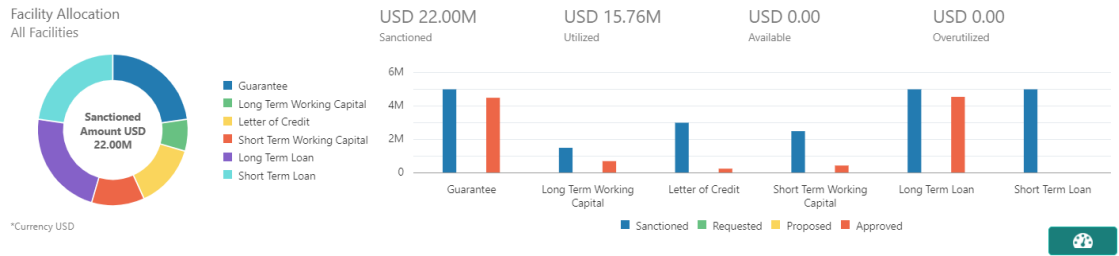
| Option/Icon   | Description  |
|---------------|--|
| Product Icons | Click on the respective product button on the top left of the portfolio to navigate to the widget corresponding to that product. |

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

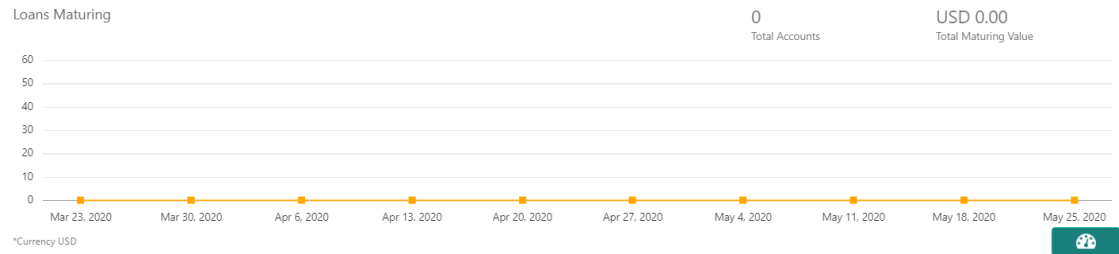
| Option/Icon   | Description  |
|---|--|
|  | Click on this icon present at the right bottom corner of the portfolio to navigate to the selected product 360 view. |

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

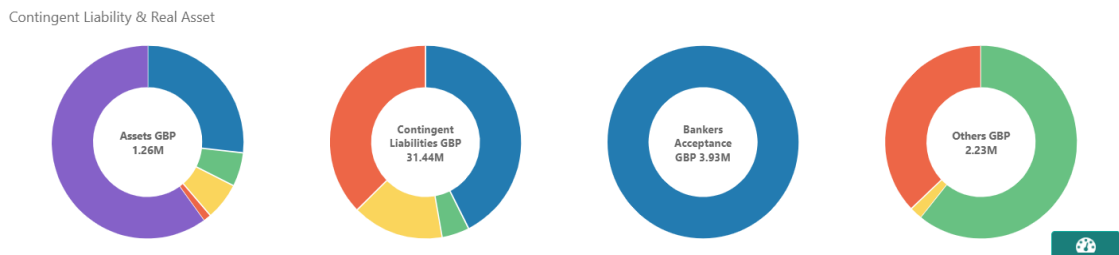
**Figure 4-2 Facilities**



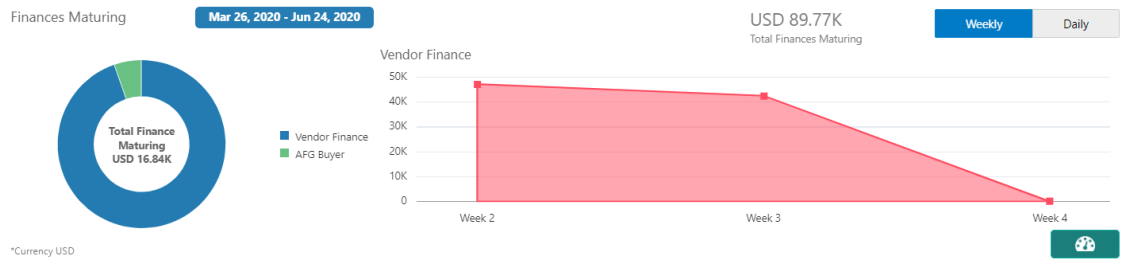
**Figure 4-3 Loans**



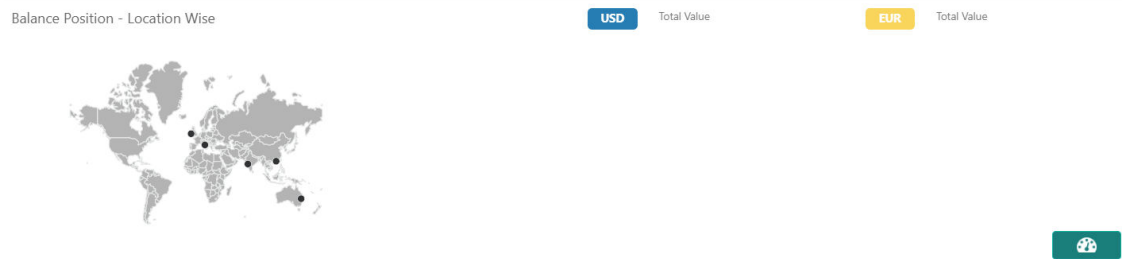
**Figure 4-4 Trade**



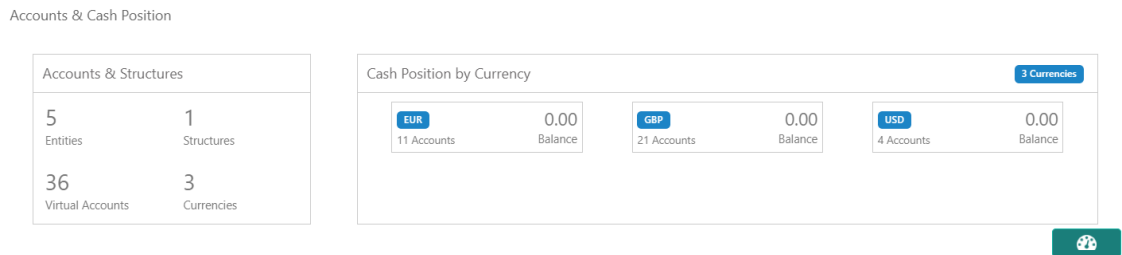
**Figure 4-5 Supply Chain Finance**



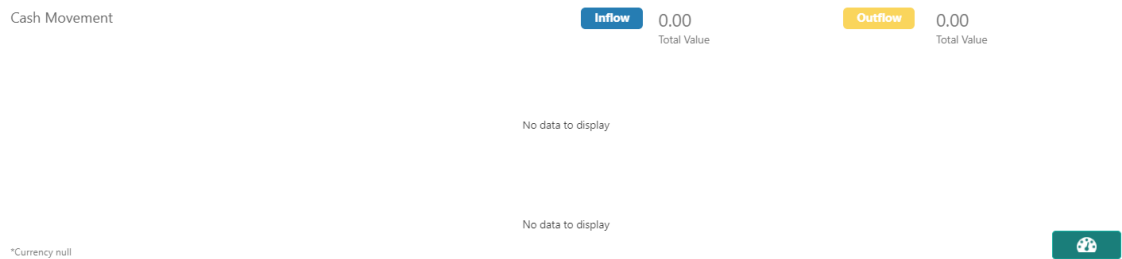
**Figure 4-6 Liquidity Management**



**Figure 4-7 Virtual Account Management**



**Figure 4-8 Cash Management**

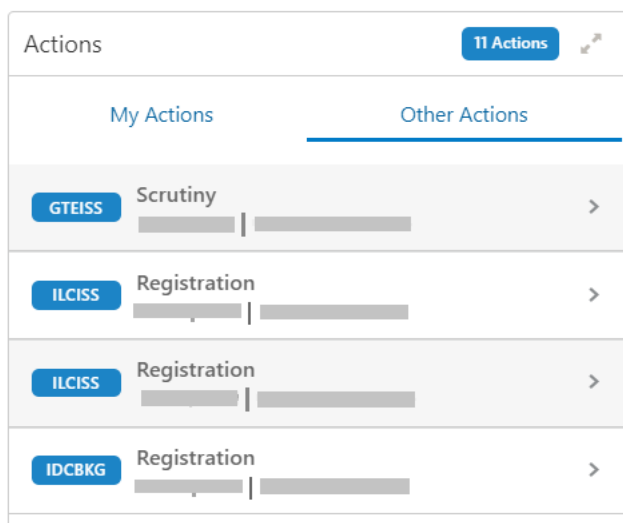


# 5 Actions

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<br>Process Ref Number: [REDACTED]<br>Application Number: [REDACTED]<br>Branch: [REDACTED]<br>Amount: [REDACTED] |
| ILCISS  | Registration | Nov 10, 2020 | M        |              | Process Name: Import LC Issuance<br>Process Ref Number: [REDACTED]<br>Application Number: [REDACTED]<br>Branch: [REDACTED]<br>Amount: [REDACTED] |
|         |              |              |          |              | Process Name: Import LC Issuance<br>Process Ref Number: 000161000038743  |

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.              |



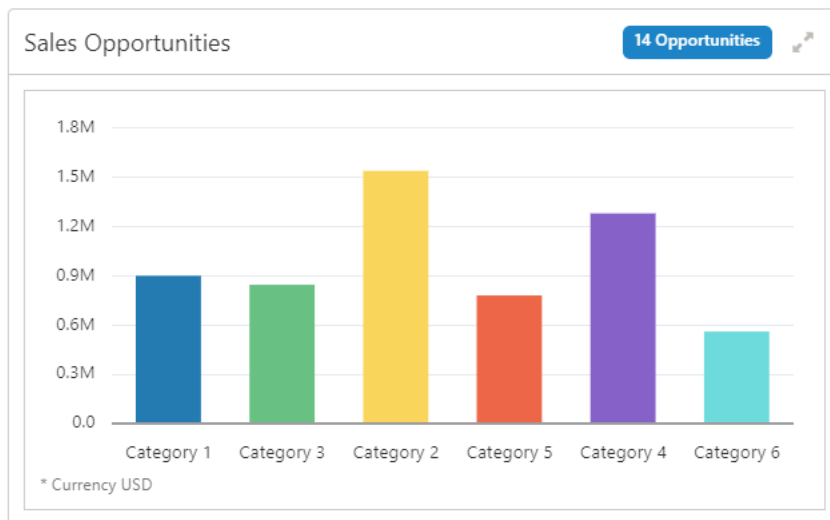
# 6

## Sales Opportunities

This topic 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**

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

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**

| <b>Column</b>         | <b>Description</b>   |
|-----------------------|--|
| <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.                   |

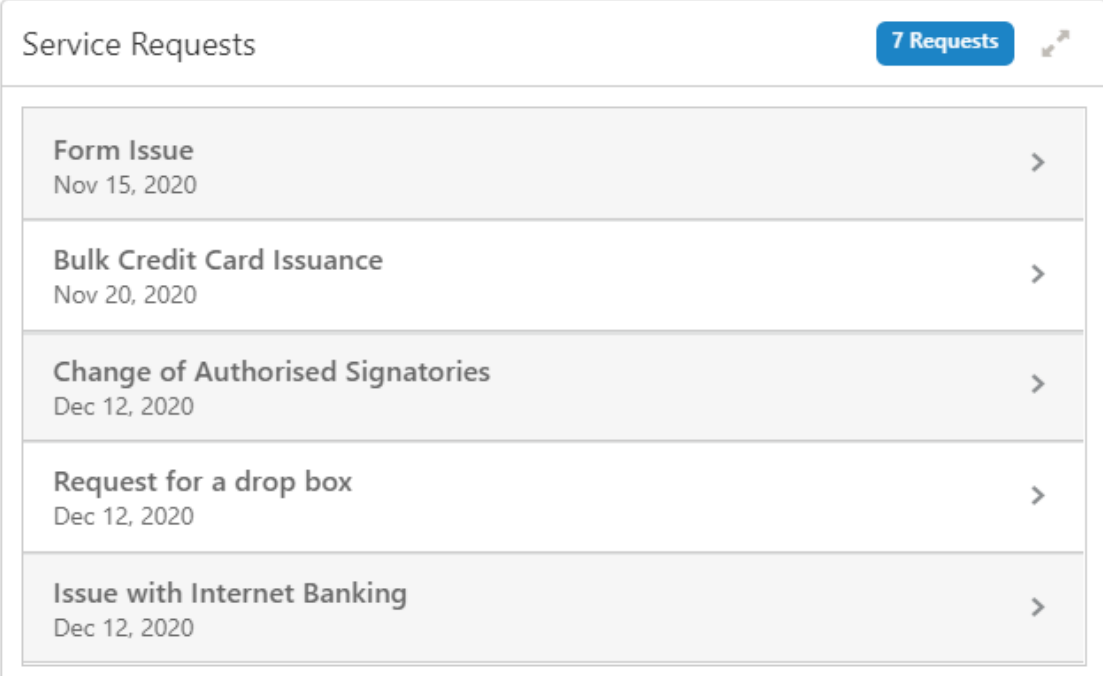
# 7

## 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 |
|---|---|------------|
| <b>Form Issue</b><br>Nov 15, 2020                       | > |            |
| <b>Bulk Credit Card Issuance</b><br>Nov 20, 2020        | > |            |
| <b>Change of Authorised Signatories</b><br>Dec 12, 2020 | > |            |
| <b>Request for a drop box</b><br>Dec 12, 2020           | > |            |
| <b>Issue with Internet Banking</b><br>Dec 12, 2020      | > |            |

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

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

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.                     |

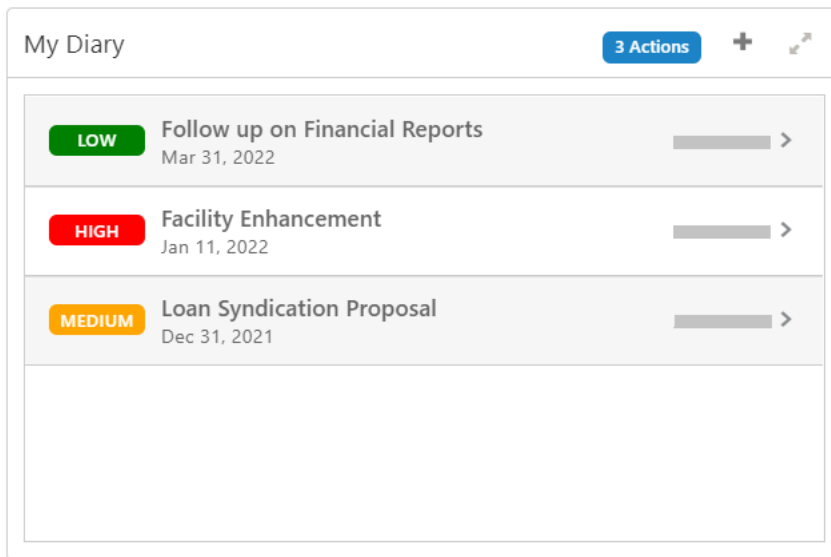
# 8

## 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 screenshot shows the 'My Diary' widget in an expanded view, displaying 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   |             |             |

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**

| <b>Column</b>       | <b>Description</b>                                  |
|---------------------|---|
| <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.               |

# Index

## A

---

Actions, [5-1](#)

## C

---

Customer Demographic, [3-1](#)

## G

---

Get Started, [2-1](#)

## M

---

My Diary, [8-1](#)

## O

---

Overview - SME 360, [1-1](#)

## P

---

Portfolio, [4-1](#)

## S

---

Sales Opportunities, [6-1](#)

Service Requests, [7-1](#)

SME 360 Page, [2-1](#)