

# **Oracle FLEXCUBE Direct Banking**

Dashboard Widgets Customer Services  
Release 12.0.2.0.0

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**ORACLE®**

Dashboard Widgets Customer Service User Manual  
September 2013

Oracle Financial Services Software Limited  
Oracle Park  
Off Western Express Highway  
Goregaon (East)  
Mumbai, Maharashtra 400 063  
India  
Worldwide Inquiries:  
Phone: +91 22 6718 3000  
Fax: +91 22 6718 3001  
[www.oracle.com/financialservices/](http://www.oracle.com/financialservices/)

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# 1. Preface

## 1.1. Intended Audience

This document is intended for the following audience:

- Customers
- Partners

## 1.2. 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>.

## 1.3. Access to OFSS Support

<https://flexsupp.oracle.com/>

## 1.4. Structure

This manual is organized into the following categories:

Preface gives information on the intended audience. It also describes the overall structure of the User Manual

Transaction Host Integration Matrix provides information on host integration requirements for the transactions covered in the User Manual.

Introduction provides brief information on the overall functionality covered in the User Manual  
Chapters post Introduction are dedicated to individual transactions and its details, covered in the User Manual

## **1.5. Related Information Sources**

For more information on Oracle FLEXCUBE Direct Banking Release 12.0.2.0.0, refer to the following documents:

- Oracle FLEXCUBE Direct Banking Licensing Guide
- Oracle FLEXCUBE Direct Banking Installation Manuals

## 2. Transaction Host Integration Matrix

### Legends

<b>NH</b>	No Host Interface Required.
<b>★</b>	Host Interface to be developed separately.
<b>✓</b>	Pre integrated Host interface available.
<b>×</b>	Pre integrated Host interface not available.

Transaction Name	FLEXCUBE UBS	Third Party Host System
Recent Transactions	NH	NH
My Transactions	NH	NH
My Approval List	NH	NH
Mails	NH	NH
Last 10 Used Cheques	✓	★
Session Summary	NH	NH
Logged In Users	NH	NH

Transaction Host Integration Matrix

Transaction Name	FLEXCUBE UBS	Third Party Host System
RSS Feeds	NH	NH
Blackout – Next 7 Days	NH	★
Notification	NH	★
Quick Tasks	NH	★
Tools	NH	★
Request Status	NH	★
Foreign Exchange Deals	NH	★

### 3. Introduction - Dashboard Widgets

Widgets are smaller windows which show data in an optimized form.

In a contemporary UI version of FLEXCUBE Direct Banking application, dashboard will have small widgets. These widgets will show minimal data related to main transactions. These widgets will also enable you to initiate transactions with minimal details.

Below **Dashboard** screen shows all the widgets displayed in it, followed by the explanation of each widget.



Dashboard

Blue

**Total Position**

5,297,316.19 USD

8,938.94 USD

Note:-Balances are consolidated in local currency.  
Last Updated On 02:28 AM



**Logged In Users**

- Mr. abhi shu (ABHICORP30)
- Mr. C USER (CUSER12)
- Mr. CUSER4 CASH MGMT (CUSER4)
- Mr. JILL LEE (JILL12)
- Mr. John Smith

Last Updated On 02:28 AM

**Account Balance**

0000005910-333-333000028

**Current Balance**  
5,000.00 INR

**Available Balance**  
5,000.00 INR

**Uncleared Funds**  
0.00 INR

**Amount on Hold**  
0.00 INR

**Overdraft Limit**  
0.00 INR

**Minimum Balance**  
100.00 INR

Last Updated On 02:28 AM

**My Accounts**

**Current and Savings**

Account Description	Current Balance
<b>333000028-ACC LTD</b>	
33300002809-333	2,108.95 GBP
0000005910-333	5,000.00 INR
33300002804-333	2,573,205.67 INR
33300002812-333	46,699.61 INR
33300002813-333	-3,118,743.99 INR
33300002814-333	1,128.09 INR
33300002807-333	549,808 JPY
33300002811-333	1,231.02 USD
33300002815-333	52,697.86 USD
33300002817-333	4,999,493.91 INR

**Mails**

Inbox 1

Compose

Last Updated on 02:28 AM

**Funds Transfer**

From\*  
Select

To\*  
Select

Amount\*  
[Input Field]

Narrative  
[Input Field]

**Initiate**

Make an Internal Transfer.

**Mini Statement**

0000005910-333-333000028

Date	Description	Amount
03-12-2007	--	5,000.00 INR C

Note:- C:Credit,D:Debit  
Last Updated On 02:28 AM

**Pay Bill**

Select a Biller  
Select a Biller

Select Account  
Select Account

Bill Number  
[Input Field]

Bill Date  
dd-mm-yyyy (dd-mm-yyyy)

Payment Amount  
[Input Field]

**Initiate**

Click here to Add New Biller

**My Approval List**

No records found  
Last Updated on 02:28 AM

**RSS Feeds**

[Weather Current Weather Conditions Across The 48 Contiguous](#)  
46 minutes ago  
Heat reaches zenith today. For more details...

[Current Weather Conditions Across The 48 Contiguous United States](#)  
[Your National Forecast Summary](#)  
[Video: Your 3-Day National Weather Forecast](#)

**My Transactions**

- Setup Account .. 10-08-2010
- Setup Account .. 10-08-2010

Last Updated On 02:28 AM

**Financial Calendar**

August 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

**Last 10 Used Cheques**

No Records Found.

**Recent Transactions**

- Create Group L.. 10-08-2010
- Setup Account .. 10-08-2010
- Setup Account .. 10-08-2010
- Preferences.. 10-08-2010
- Pay Bill.. 10-08-2010

89.00 GBP  
Last Updated on 02:28 AM

**Session Summary**

- 10-08-2010 02:28:00
- 10-08-2010 01:51:27
- 10-08-2010 01:47:56
- 09-08-2010 23:30:01
- 09-08-2010 23:11:29

**Loan Rate Inquiry**

- Preshipment Finance -BC
- Financial Lease (L002)

**Inward Remittance Inquiry**

0000005910-333-333000028

No records found, to search again please amend your inputs  
Last Updated On 02:28 AM

**Blackout - Next 7 Days**

Last Updated on 02:28 AM

**Currency Converter**

1 Indian Rupee (INR)  
to U.S. Dollar (USD)

**Convert**

Terms of Use









**Branch Locator**




Google Gadgets powered by Google  
\*\*Information displayed above is external to the bank's site.

## 4. Recent Transactions

This widget displays the last 5 performed transactions in a minimalistic form.

### Widget – Recent Transactions

Recent Transactions  	
 Modify Account..	15-04-2011
 Modify Account..	15-04-2011
 Modify Account..	15-04-2011
 Modify Account..	15-04-2011
 Setup Account ..	31-03-2011
Last Updated on 13:00 PM 	

1. Last 5 transactions along with their initiation or last updating date are displayed in Recent Transactions widget as shown above.
1. Click any of the displayed transactions. The system displays that transaction in detail in **View Transactions** screen.
2. Click the ,  icons in the widget to refresh and minimize the widget respectively.
3. Click the  icon in the widget. The system displays the **View Transactions** screen.

View Transactions

15-04-2011 13:00:00 GMT +0530

View By Transaction Status

[Initiated Transactions](#) | 
 [View Drafts/Templates](#) | 
 [Transactions To Authorize](#) | 
 **[View Transactions](#)**



**View Transactions**




Transaction Type	Status	Count	
Attach Documents	<a href="#">Initiated</a>	1	0.3%
Change Users Limits	<a href="#">Accepted</a>	1	0.3%
	<a href="#">Pending for Processing</a>	1	0.3%
Create Group Linkage	<a href="#">Under Process</a>	41	12.35%
	<a href="#">Accepted</a>	43	12.95%
	<a href="#">Error</a>	4	1.2%
Customer Acceptance	<a href="#">Initiated</a>	1	0.3%
Direct Collection	<a href="#">Initiated</a>	1	0.3%
Domestic Funds Transfer	<a href="#">Rejected</a>	2	0.6%
E Statement	<a href="#">Under Process</a>	2	0.6%
	<a href="#">Accepted</a>	1	0.3%
Export Bill Under LC	<a href="#">Initiated</a>	1	0.3%
Export Collection	<a href="#">Initiated</a>	1	0.3%
Forex Deal Booking	<a href="#">Accepted</a>	5	1.51%
Initiate LC	<a href="#">Initiated</a>	1	0.3%
Initiate Outward Guarantee	<a href="#">Initiated</a>	1	0.3%
Internal Account Transfer	<a href="#">Completed</a>	3	0.9%
LC Amendment Initiate	<a href="#">Initiated</a>	1	0.3%
Lookup Maintenance	<a href="#">Initiated</a>	2	0.6%
	<a href="#">Accepted</a>	4	1.2%
Modify Account Structure	<a href="#">Under Process</a>	47	14.16%
	<a href="#">Accepted</a>	1	0.3%
Multiple Internal Transfer	<a href="#">Rejected</a>	2	0.6%
	<a href="#">Completed</a>	2	0.6%
Outward Guarantee Amendment	<a href="#">Initiated</a>	1	0.3%
Own Account Transfer	<a href="#">Rejected</a>	6	1.81%
	<a href="#">Completed</a>	1	0.3%
Setup Account Structure	<a href="#">Under Process</a>	62	18.67%

## 5. My Transactions

This widget displays the last 5 initiated transactions in a minimalistic form.

### Widget – MyTransactions

My Transactions		 
 Lookup Mainten..	31-03-2011	
 Lookup Mainten..	31-03-2011	
 Lookup Mainten..	31-03-2011	
 Export Bill Un..	31-03-2011	
	45,433.00 USD	
 Direct Collect..	31-03-2011	
	5,000,000.00 USD	
Last Updated On 13:00 PM		

1. Last 5 transactions along with their initiation or last updating date are displayed in My Transactions widget as shown above.
2. Click any of the displayed transactions. The system displays that transaction in detail in **View Initiated Transactions** screen.
3. Click the ,  icons in the widget to refresh and minimize the widget respectively.
4. Click the  icon in the widget. The system displays the **View Initiated Transactions** screen.

View Initiated Transactions

View Initiated Transactions 15-04-2011 13:00:00 GMT +0530

View By Transaction Status ▾




[Initiated Transactions](#) | 
 [View Drafts/Templates](#) | 
 [Transactions To Authorize](#) | 
 [View Transactions](#)




Transaction Type	Status	Count	
Attach Documents	<a href="#">Initiated</a>	1	5.26%
Customer Acceptance	<a href="#">Initiated</a>	1	5.26%
Direct Collection	<a href="#">Initiated</a>	1	5.26%
Export Bill Under LC	<a href="#">Initiated</a>	1	5.26%
Export Collection	<a href="#">Initiated</a>	1	5.26%
Initiate LC	<a href="#">Initiated</a>	1	5.26%
Initiate Outward Guarantee	<a href="#">Initiated</a>	1	5.26%
LC Amendment Initiate	<a href="#">Initiated</a>	1	5.26%
Lookup Maintenance	<a href="#">Initiated</a>	2	10.53%
	<a href="#">Accepted</a>	4	21.05%
Outward Guarantee Amendment	<a href="#">Initiated</a>	1	5.26%
Own Account Transfer	<a href="#">Initiated</a>	1	5.26%
Pay Bill	<a href="#">Initiated</a>	1	5.26%
Trade Lookup Delete	<a href="#">Accepted</a>	1	5.26%
Unmark Account as Parent	<a href="#">Accepted</a>	1	5.26%

## 6. Pending For Authorization

This widget displays the last few (as configured in the system) transactions waiting for user's approval/authorization.

### Widget – Pending For Authorization

Pending for Authorization   		
Own Account Tr..	25-04-2012	1,120.00 GBP

1. Last 'n' transactions along with their initiation or last updating date and transaction amount are displayed in Pending For Authorization widget as shown above.
2. Click any of the displayed transactions. The system displays that transaction in detail in **View Pending Authorization Transactions** screen.
3. Click the ,  icons in the widget to refresh and minimize the widget respectively.
4. Click the  icon in the widget. The system displays the **View Authorization Transactions** screen.

### View Authorization Transactions

**View Authorization Transactions** 25-04-2012 22:28:30 GMT +0530

View By:  Transaction Status

[Initiated Transactions](#) [View Drafts/Templates](#) [Transactions To Authorize](#) [View Transactions](#)

**Transactions To Authorize**




Transaction Type	Status	Count	
Own Account Transfer	Initiated	1	<div style="width: 100%; height: 10px; background-color: red;"></div> 100%

## 7. Last 10 Used Cheques

This widget displays the cheque status inquiry in a minimalistic form. It will display last 10 cheques marked as used across all your accounts.

### Widget – Last 10 Used Cheques

Last 10 Used Cheques		
▼ QT200178104	26	100.00 GBP
▼ QT100177402	121	500.00 USD
▼ 1000000796	276	150.00 GBP
Last Updated on 13:00 PM		

1. Click the Account Number. The system will display cheques under that account which are marked as used. It will also display amount of the cheque with the currency.
2. Click the  icon. The system displays the **Cheque Status Inquiry** screen to enquire about cheque status.  
OR  
Click the ,  icons to refresh and minimize the widget respectively.

### Cheque Status Inquiry



**Cheque Status Inquiry** 15-04-2011 13:00:00 GMT +0530

---

The Cheque Status shall be displayed if the Cheque is a valid cheque. Additional information for the Cheque shall be available if the Cheque has been presented to the bank.

Select Account:

Status:

From Date:

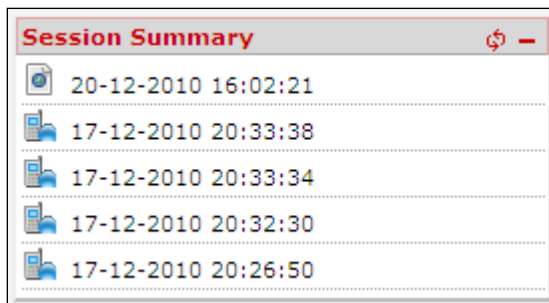
To Date:




Search By Cheque Number

## 8. Session Summary

This widget displays the session summary in a minimalistic form. This widget displays last 5 login session dates and time when session was started. Session summary will be displayed using preferred time zone of the user.

### Widget – Session Summary



1. Click the  icon. The system displays **Session Summary** screen with earlier login details.  
OR  
Click the ,  icons to refresh and minimize the widget respectively.

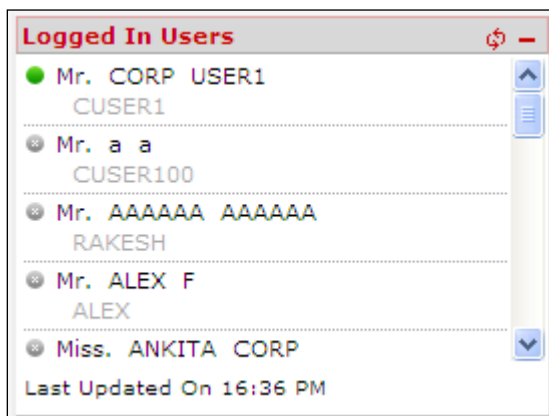
Session Summary



Session Summary		20-12-2010 16:15:38 GMT +0530	
Channel User Id	MIRETAIL	Session Start	20-12-2010 16:02:21 GMT +0530
Transaction Name	Status	Transaction Date	
Login (LGN)	Success	20-12-2010 16:02:21 GMT +0530	
Transactions (VAT)	Success	20-12-2010 16:02:41 GMT +0530	
Loan Interest Rates (LIR)	Success	20-12-2010 16:02:42 GMT +0530	
Mailbox (IMS)	Success	20-12-2010 16:02:45 GMT +0530	
Transaction Blackout (TBO)	Success	20-12-2010 16:02:50 GMT +0530	

## 9. Logged In Users

This widget displays the list of other users having the same customer id. It also displays the logged in status of those users.

### Widget – Logged In Users

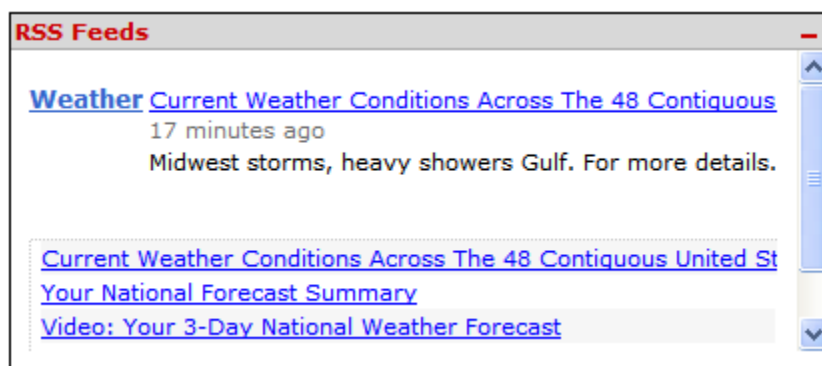



1. Widget displays green icon for logged in user and grey icon for offline users. User name with their user id is also displayed as shown in the above screen.
2. Click the ,  icons to refresh and minimize the widget respectively.

## 10. RSS Feeds

This widget displays the integrated RSS Feeds. RSS (Real Simple Syndication) is a relatively new and easy way to distribute content via the internet. This widget mainly displays frequently updated works such as blog entries, news headlines, weather forecast etc in a standardized format.

### Widget – RSS Feeds

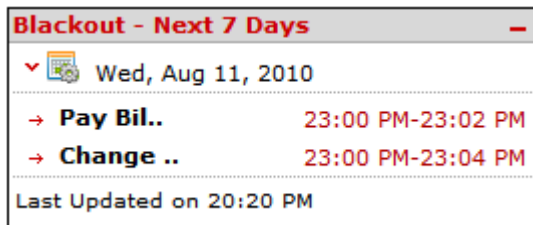




1. Click any of the links. The system will display its contents in a new window.
2. Click the  icon to minimize the widget.

## 11. Blackout – Next 7 Days

This widget displays blackouts planned for next 7 days. You will not be able to access that transaction for the specified blackout period.

### Widget – Blackout – Next 7 Days



1. Click the  icon. The system displays transaction name for which the blackout has been set and also the time period of the blackout.
2. For e.g. as shown in the above screen, blackout has been set for Pay bill and Change Password transactions. Pay Bills transaction will not be accessible during the period 23.00 PM to 23.02 PM on Aug 11 and Change Password transaction will not be accessible during the period 23.00 PM to 23.04 PM on Aug 11.
1. Click the  icon to minimize the widget.

## 12. Notifications



This widget displays notifications that are generated for the user. The Notifications widget consist of Alerts, Tasks, Mail Messages, Bulletins Received.


There are links provided on the subject/title of each Alert, Message and Bulletin. On clicking on a link, the mailbox will be displayed with details of that alert, message or bulletin

### Widget – Notifications

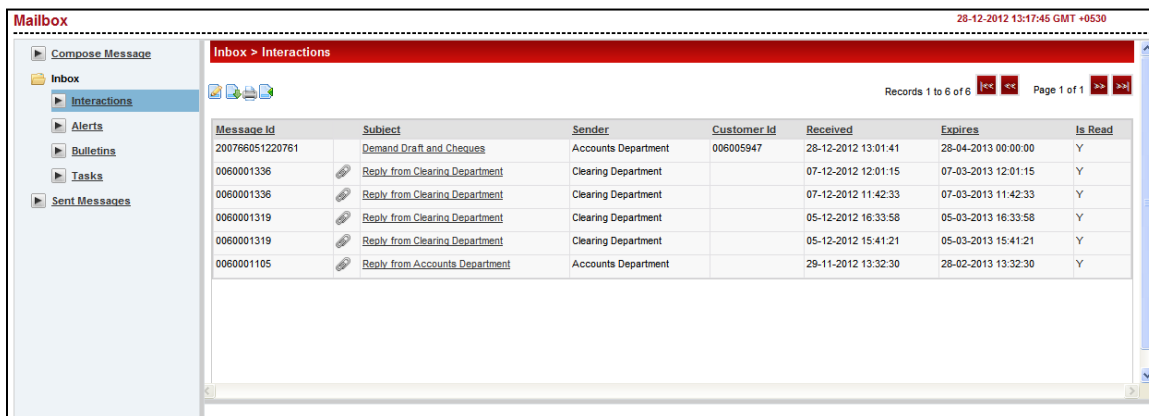


1. Click the **Alerts** tab to view the alerts.  
OR  
Click the **Messages** tab to view the messages.
2. Click any message subject as highlighted in red border in above screen. The system displays that message in **Mailbox – Interactions** screen.  
OR

Click the ,  icons to refresh and minimize the widget respectively.  
OR

Click the  icon. The system displays enlarged Mailbox screen as shown below.

## Mailbox



The screenshot shows the Mailbox interface with a sidebar on the left containing options like 'Compose Message', 'Inbox', 'Interactions', 'Alerts', 'Bulletins', 'Tasks', and 'Sent Messages'. The main area displays a table of messages under the 'Inbox > Interactions' header. The table includes columns for Message Id, Subject, Sender, Customer Id, Received, Expires, and Is Read. There are 6 records displayed, with the first record being 'Demand Draft and Cheques' from the Accounts Department.

Message Id	Subject	Sender	Customer Id	Received	Expires	Is Read
200766051220781	Demand Draft and Cheques	Accounts Department	006005947	28-12-2012 13:01:41	28-04-2013 00:00:00	Y
0060001336	Reply from Clearing Department	Clearing Department		07-12-2012 12:01:15	07-03-2013 12:01:15	Y
0060001336	Reply from Clearing Department	Clearing Department		07-12-2012 11:42:33	07-03-2013 11:42:33	Y
0060001319	Reply from Clearing Department	Clearing Department		05-12-2012 16:33:58	05-03-2013 16:33:58	Y
0060001319	Reply from Clearing Department	Clearing Department		05-12-2012 15:41:21	05-03-2013 15:41:21	Y
0060001105	Reply from Accounts Department	Accounts Department		29-11-2012 13:32:30	28-02-2013 13:32:30	Y

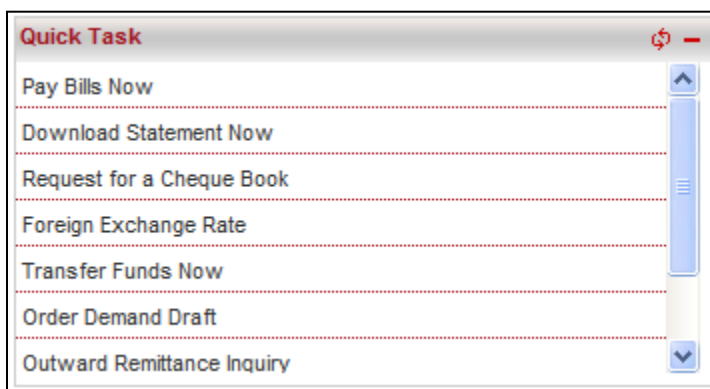
3. You can compose any new message or view received/sent messages from this screen.
4. Refer **Mailbox** section in **User Manual Oracle FLEXCUBE Direct Banking Retail Customer Services** OR **User Manual Oracle FLEXCUBE Direct Banking Corporate Customer Services** for further details.





## 13. Quick Tasks

This widget allows the user to easily access the given transactions without having to navigate through the menu. Transactions to be displayed as Quick Tasks will be predefined. Only those transactions will be displayed in the user's widget for which the user has access.

### Widget – Quick Tasks

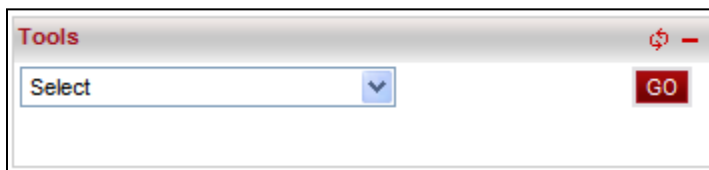




1. Click any of the transaction links. The system opens that transaction in a new window.
2. Click the ,  icons in the widget to refresh and minimize the widget respectively.

## 14. Tools

This widget allows the user to easily access the tools available in the application without having to navigate through the menu. Transactions to be displayed as Tools will be predefined as per the user type combination. Only those transactions will be displayed in the user's widget for which the user has transaction access.

### Widget – Tools

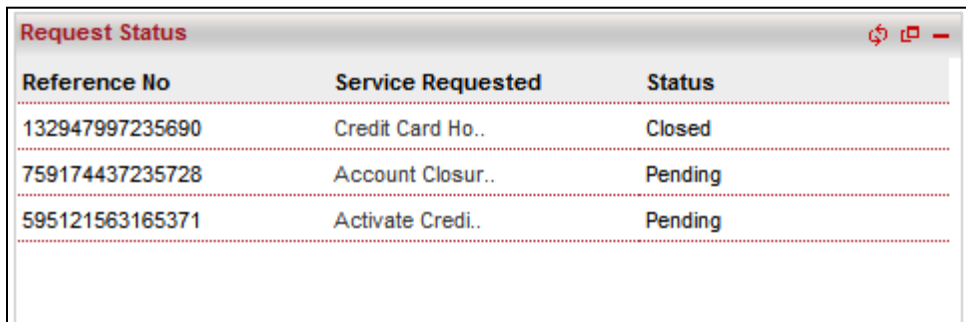


1. Select any tools/transaction from the dropdown.
2. Click the **GO** button. The system displays selected transaction in a new window.
3. Click the ,  icons in the widget to refresh and minimize the widget respectively.

## 15. Request Status

This widget will display, in the case of Retail Users, latest status of service requests initiated by the user. In the case of Corporate Users, this widget will display status updations of all service requests initiated by users belonging to the customer ID, to which the user has view access as per mandates set. Hence, status updations of service requests as available in the, 'View Transactions' screen of User Authorisations dashboard will be displayed in the Corporate User's dashboard.

### Widget – Request Status



Reference No	Service Requested	Status
132947997235690	Credit Card Ho..	Closed
759174437235728	Account Closur..	Pending
595121563165371	Activate Credi..	Pending

### Field Description




Field Name	Description
------------	-------------

Field Name	Description
<b>Reference No</b>	[Display] This column displays the ID of the request generated by the system at the time of request initiation.
<b>Service Requested</b>	[Display] This column displays the type of request.
<b>Status</b>	[Display] This column displays the current status of the service request.

- Click on any of the transaction in Service Requested column. The system will display that transaction In View Initiated Transactions screen as shown below.

### View Initiated Transactions

View Initiated Transactions								25-04-2012 21:08:05 GMT +0530	
Reference Number	Transaction Type	Created On	Updated By	Updated On	Status	Version	Value Date	Host Reference Number	
759174437235728	Account Closure	10-04-2012 12:19:27	SALRETAIL	10-04-2012 12:19:27	Pending [60]	1			
Account: 7853448779422 Balance: 27000.000000 Reason: Migrating to another country									
Note: <input type="text"/>									
Audit Detail									
Authorizer/s	Authorized On	Status	Value Date	Amount	Note				
<input checked="" type="checkbox"/> SALRETAIL	10-04-2012 12:19:27	Pending [60]			0				
<input checked="" type="checkbox"/> SALRETAIL	10-04-2012 12:19:27	Authorized [3]			0				

- Click the ,  icons in the widget to refresh and minimize the widget respectively.
- Click  icon. The system displays **View Initiated Transaction** screen as shown below.

View Initiated Transactions

View Initiated Transactions 25-04-2012 21:18:28 GMT +0530

View By Transaction Status

**Initiated Transactions** | **View Drafts/Templates**

Transaction Type	Status	Count	
Amend Term Deposit	Accepted	4	6.78%
	Rejected	8	13.56%
Demand Draft-Pay Order Request	Accepted	2	3.39%
International Account Transfer	Rejected	1	1.69%
International Transfer Beneficiary	Accepted	1	1.69%
Multiple Internal Transfer	Rejected	4	6.78%
	Under Process	1	1.69%
Open Term Deposit	Rejected	12	20.34%
	Accepted	6	10.17%
Own Account Transfer	Rejected	6	10.17%
	Completed	3	5.08%
	Under Process	1	1.69%
Pay Bill	Rejected	1	1.69%
	Under Process	1	1.69%
Redeem Term Deposit	Rejected	3	5.08%
	Accepted	3	5.08%
Standing Instruction Cancellation	Rejected	1	1.69%
Stop Or Unblock Cheque Request	Rejected	1	1.69%

## 16. Foreign Exchange Deals

This widget will display minimal details of all the foreign exchange deals available to the user. The deals will be grouped by the value date and will be in chronological order.




### Widget – Foreign Exchange Deals

Foreign Exchange Deals						
Customer Id	Buy Currency- Sell Currency	Value Date	Deal Type	Amount	Utilized Amount	Rate
004004370	USD-GBP	13-04-2012	Buy	17,176.00 USD	Nil	1.7176

### Field Description

Field Name	Description
<b>Customer ID</b>	[Display] This column displays the Customer id for which the deal is booked.
<b>Buy Currency - SellCurrency</b>	[Display] This column displays the currency pair of the deal.

Field Name	Description
<b>Value Date</b>	[Display] This column displays the Value Date of the deal.
<b>Deal Type</b>	[Display] This column displays the Type of deal - buy or sell.
<b>Amount</b>	[Display] This column displays the Amount of the deal.
<b>Utilized Amount</b>	[Display] This column displays the Amount of the deal that has been utilized along with the currency.
<b>Rate</b>	[Display] This column displays the Rate at which the deal was made.

1. Click the ,  icons in the widget to refresh and minimize the widget respectively.
2. Click  icon. The system displays **View Deal Details** screen as shown below.

### View Deal Details

**View Deal Details** 25-04-2012 23:39:42 GMT +0530

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Customer Id:

Buy Currency:

Deal Booking Date From:

Deal Type:

Sell Currency:

Deal Number:

Value Date: