



Oracle Application Integration
Architecture Release 1.0

Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products Implementation Guide

Version 1.0

November 2007

Part Number: E05579-01

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1

Introduction to Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products

Preface

Welcome to the Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products Implementation Guide.

TTY Access to Oracle Support Services

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Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Structure

- 1 [Introduction to Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products](#)
- 2 [Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products Environment](#)
- 3 [Integrations](#)
- 4 [Installation and Configuration](#)
- 5 [Data Loading](#)
- 6 [Troubleshooting](#)

Related Documents

For more information, read the following documents:

- [FCHOSTDB_Installation.doc.](#)
- [FHOSTAS_Installation_10gAS_Unix.doc.](#)
- [Installation Document for components of Siebel CRM](#)

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Glossary and Abbreviations

24/7 Processing. Ideally an application should be available for processing transactions 24 hours a day, seven days a week. However, some applications must run periodic batch processes (daily, weekly, monthly, yearly). During these batch processes, certain transactions can not be executed on the affected records (such as financial account or customer records).

EAI. Enterprise Application Integration.

Financial Account. Financial Account (such as savings or checking account) which represents the products and services a customer owns within a Financial Institution.

Master Data. Peripheral data to an actual transaction that is required to complete a transaction (such as contact name, contact number, and so on).

Transactional Data. Data that is transactional in nature (such as stemming from a customer interaction). Examples: Opening an account, logging an Service Request (for example: requesting a copy of a statement).

UCM. Universal Customer Master. Siebel Universal Customer Master (UCM) is a comprehensive customer data integration (CDI) solution that helps companies create and maintain unique, complete, and accurate customer information and makes this information available to other business applications and systems just in time.

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Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products Environment

This chapter contains the following information:

- [About Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products on page 11](#)
- [Software Requirements on page 14](#)
- [Language Support on page 14](#)

About Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products

Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products integrates Oracle's Siebel CRM with i-flex's FLEXCUBE software. This product integrates the following applications:

- i-flex FLEXCUBE UBS - FC UBS V.UM 7.2.0.0.0.0.0
- Siebel CRM (SIA) Version 7.8.2.4

To enable this integration, data must be transferred between the applications and transformed to meet the database schemas for each application. To accomplish this, the integration uses the Oracle SOA Suite.

The integration architecture uses a hub and spoke model. In this model, when one application sends data to the other, it does not send it directly but rather to a common middleware application. The data is transferred in a common format. [Figure 1](#) illustrates the data flow.

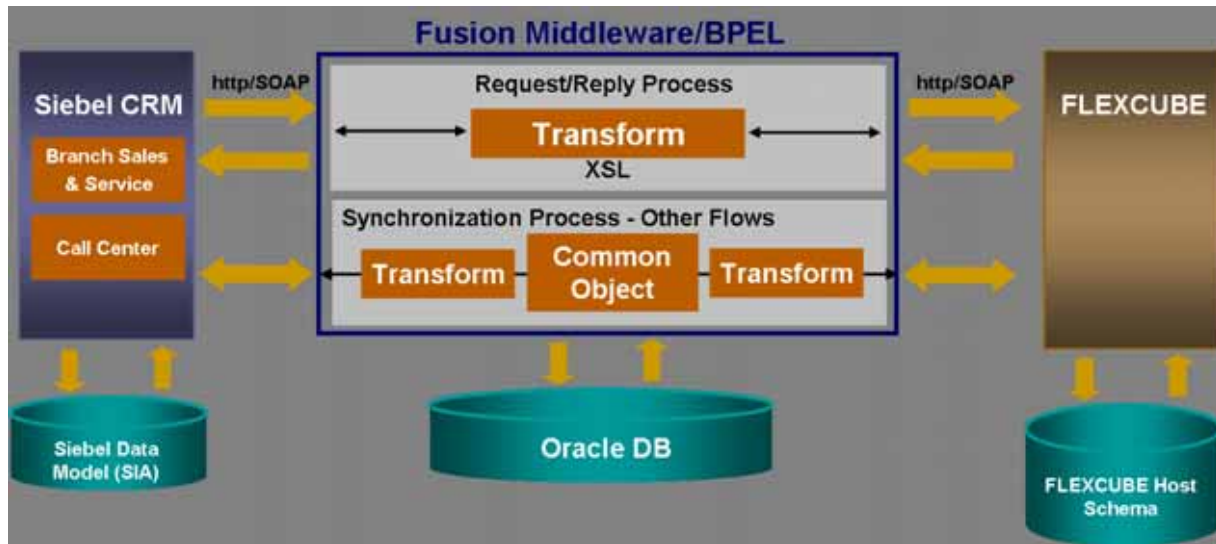


Figure 1. Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products Data Flow

Figure 2 illustrates the overall architecture of the integration.

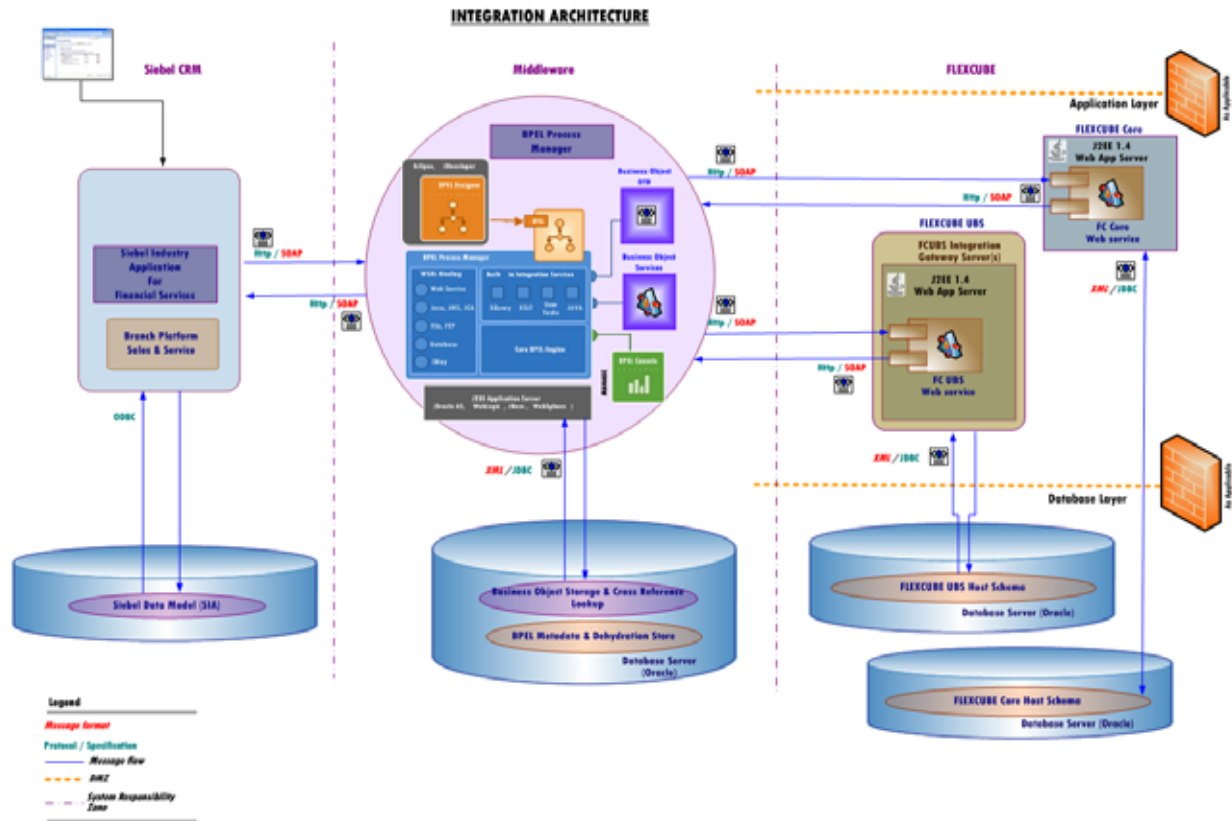


Figure 2. Integration Architecture

To maintain data integrity, Siebel CRM is the master application for contact data, and i-flex FLEXCUBE is the master application for financial account and product information.

In case a financial account needs to be opened directly in i-flex, then it is assumed that the contact been created in Siebel CRM before the account is created directly in i-Flex.

Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products supports the integration points as listed in Table 1.

Table 1. Integration Points

Integration Point	Source Application	Target Application
Change Customer Account Address Service Request	Siebel CRM	i-flex FLEXCUBE
Fetch Customer	i-flex FLEXCUBE	Siebel CRM
Modification of Term Deposit Rollover details	Siebel CRM	i-flex FLEXCUBE

Table 1. Integration Points

Integration Point	Source Application	Target Application
Request Financial Account Statement Service Request	Siebel CRM	i-flex FLEXCUBE
Request Financial Account Transactions	Siebel CRM	i-flex FLEXCUBE
Request Summary of Customer's Financial Accounts	Siebel CRM	i-flex FLEXCUBE
Submit Financial Application	Siebel CRM	i-flex FLEXCUBE
Synchronize Customer	Siebel CRM	i-flex FLEXCUBE
Synchronize Financial Account	i-flex FLEXCUBE	Siebel CRM
Synchronize Product	i-flex FLEXCUBE	Siebel CRM

Software Requirements

Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products requires the following:

Applications:

- i-flex FLEXCUBE UBS - FC UBS V.UM 7.2.0.0.0.0.0
- Siebel CRM (SIA) Version 7.8.2.4

Additional software:

- Oracle SOA Suite 10.1.3.1 (with patchset 5679724)
- Oracle Warehouse Builder 10.2
- Siebel Tools version 7.8.2

Language Support

The Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products supports English only.

3

Installation and Configuration

This chapter contains the following information:

- [Downloading and Installing Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products Software on page 15](#)
- [Installing and Configuring Fusion Middleware Software on page 16](#)
- [Configuring Siebel CRM on page 21](#)
- [Configuring Business Processes Execution Language on page 43](#)
- [Configuring i-flex FLEXCUBE on page 48](#)

Downloading and Installing Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products Software

The required software for Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products is available on Oracle E-Delivery.

Some of the BPEL objects are developed by i-flex and are not included in the media packs on Oracle E-Delivery. These objects are available directly from i-flex. Support for these objects is also through i-flex.

To download the files

- 1 Log in to Oracle E-Delivery (<http://edelivery.oracle.com>).
- 2 From the Product Pack menu, choose Oracle Application Integration Architecture.
- 3 From the Platform menu, choose your platform, and click Go.
- 4 Download the following files:
 - Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products, v1.0, Implementation Guide (Documentation_iflexFINSv1.0.zip)
 - Oracle Database 10g Release 2 (10.2.0.1) (file name(s) and count vary by platform)
 - Oracle Database 10g Release 2 Patches (DB_Patches_AIAv1.0.zip)
 - Oracle SOA Suite 10g (10.1.3.1.0) (file name(s) and count vary by platform)
 - Oracle Fusion Middleware 10.1.3.1 Patches (FMW_Patches_AIAv1.0.zip)

- Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products, v1.0, Siebel CRM Patches (7.8.2.4sia_19224_W32_QF1408.zip)
- Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products, v1.0 (SEBLIntegPkIFLEXAcctOrigUBSv1.0.zip)

Installing and Configuring Fusion Middleware Software

Installing and configuring Fusion Middleware consists of the following tasks:

- [Installing Fusion Middleware on page 16](#)
- [Installing Fusion Middleware and JDeveloper Patches on page 17](#)
- [Extracting the Integration Files on page 18](#)
- [Setting up Common Functions on page 19](#)
- [Defining Datasources on page 20](#)
- [Importing ID Cross-Reference Seed Data on page 20](#)

Installing Fusion Middleware

Install the following Fusion Middleware components:

- 1 Oracle Database 10g Release 2 (10.2.0.1) Enterprise Edition. (Mandatory)**
Download and install the database only if you do not already have an Oracle 10.2.0.2 (or higher) database instance available for the SOA Suite to access. For information on installing Oracle Database, refer to the Oracle Technology Network. Oracle Technology Network link has the following URL:
<http://www.oracle.com/technology/documentation/index.html>
After installation, apply the appropriate patch from DB_Patches_AIAv1.0.zip (choose the patch appropriate to the operating system that your database is installed on.) This patch brings the database up to required version 10.2.0.2.
- 2 SOA Suite 10g10.1.3.1 (Mandatory)**
For information on installing Oracle SOA Suite, refer to the Oracle Application Server Documentation Library. The library is available on the Oracle Technology Network. Oracle Technology Network link has the following URL:
<http://www.oracle.com/technology/documentation/index.html>.
Click Oracle Application Server 10g Release 3 (10.1.3.1)
Make sure to install the full SOA suite using the Advanced Installation Mode.

- 3 Oracle JDeveloper 10.1.3.1 (Studio Version) (Optional. Needed to edit BPEL flows)
Download Oracle JDeveloper from:
<http://www.oracle.com/technology/software/products/jdev/archives.html>.
This is a free download. Support for JDeveloper is not included. If desired, support for JDeveloper can be purchased separately. For information on installing Oracle JDeveloper, refer to the Oracle Technology Network. Oracle Technology Network link has the following URL:
<http://www.oracle.com/technology/documentation/index.html>
- 4 Oracle Warehouse Builder 10gR2 10.2.0.1 (Mandatory)
Oracle Warehouse Builder is used to perform initial data synchronization as described in [Chapter 4, "Data Loading."](#) Use of OWB for initial data synchronization requires the ETL and Data Quality options from Oracle Warehouse Builder. OWB is not included in this media pack and must be licensed separately. Install and configure OWB using the instructions in its documentation.

Installing Fusion Middleware and JDeveloper Patches

Install all Fusion Middleware and JDeveloper patches described in this section. If any particular patch has already been installed, there is no need to reinstall it. The latest version of each patch can be downloaded from <http://metalink.oracle.com>. Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products supports Fusion Middleware in a Linux environment. Other environments are not supported.

If you have already installed any of these patches you do not need to reinstall them.

To install SOA Suite patches

- 1 Download the Fusion Middleware and JDeveloper patches. The file name is:
FMW_Patches_AIAv1.0.zip
- 2 Unzip the file to yield the mandatory bug-fix patches listed in the following table.

Patch Number	Comments
5473225	Fixes problems that involve catching an exception during a transform.
5596476	Fixes problems that involve the XSLT map not rendering in the user interface.
5609537	Fixes issues with commit in child processes.

Patch Number	Comments
5917910	<p>Fixes problems that involve:</p> <ul style="list-style-type: none"> ■ Creating <XSL:variable> with value "&#0;" ■ Java heap error on Service Oriented Architecture Suite, V10.1.3.1 release on Linux. ■ Invoking PL/SQL procedure with a large output parameter.
5931554	<p>Fixes problems that involve:</p> <ul style="list-style-type: none"> ■ Cross-reference feature ■ XPATH function, LOOKUP-DVM, but does not work in assign activity of Business Processes Execution Language.

3 Apply each of these patches to your installation.

Refer to the ReadMe.txt in each patch for guidance on how to apply the patch.

Extracting the Integration Files

Use the following procedure to extract the integration files.

To extract the integration files

1 Locate the following file you downloaded in [“Downloading and Installing Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products Software”](#) on page 15:

SEBLIntegPki FLEXAcctOri gUBSv1. 0. zi p

2 Unzip the file.

- a If you are using Windows, unzip this file into a folder that has a short name, such as D:/Temp.
- b If you are using Linux, unzip the file to a convenient directory.

When unzipped, a directory is created that has a build number. This directory contains a directory named “SEBLAcctOrigIntegPkiFLEXUBS” which contains the integration files needed in the following steps. In the remaining instructions this directory is referred to as “CRMINTEG_HOME”.

Within the CRMINTEG_HOME directory are the following directories:

- **BulkDataLoad.** Has content for performing an initial data load of data.
- **BusinessProcesses.** Has content for ongoing synchronization. These are the Oracle Business Processes Execution Language (BPEL) processes and related content.
- **SetUp.** Contains setup content for BPEL Processes.
- **SharedComponents.** Has shared components for BPEL Processes. You need these directories and their files to complete the remaining installation and configuration tasks.

Setting up Common Functions

Complete the following procedures.

To set up common functions

- 1 Log in as an administrative user.
 - 2 Change directory to:
`CRMI NTG_HOME/SharedComponents/Utili ty/CommonFuncti ons`
 - 3 Using SQLPlus connect to the cross-reference schema, and run this file:
`create_crmi ntgCommon_schema. sql`
- NOTE:** The schema for the cross-reference tables is the one you applied FMW patch 5931554 to, and have run the `xreftables.sql` script on. Any schema can be selected for this purpose.
- 4 Change directory to `<SOA_HOME>/bpel/system/classes`.
 - 5 Extract the `crmintg-common.jar` file from the build folder to `<SOA_HOME>/bpel/system/classes` with folder structure using the following command:
`jar xvf CRMI NTG_HOME/SharedComponents/Utili ty/CommonFuncti ons/crmi ntg-common. jar`
 - 6 Make a backup copy of `<SOA_HOME>/bpel/system/config/xpath-functions.xml`.
 - 7 Open the following file:
`CRMI NTG_HOME/SharedComponents/Utili ty/CommonFuncti ons/crmi ntg-xpath-functionEntries.xml`
 - 8 Copy the contents of the above file and paste them near the end of this file:
`<SOA_HOME>/bpel /system/confi g/xpath-functi ons. xml`

NOTE: This content should go inside the top level element (`bpel-xpath-functions`), not after that.

To set up canonical objects

- 1 Locate the following folder:
`CRMI NTG_HOME/Busi nessProcesses/xmli b/SEBLAcctOri gl ntegPki FLEXUBS`
- 2 Copy its contents to the `xml lib` folder of your SOA install.
`<SOA_HOME>/bpel /system/xmli b`
- 3 Restart the SOA suite.
- 4 Verify that the schema can be accessed by typing in the following URL in your browser:
`http: //127. 0. 0. 1: 8888/orabpel /xmli b/SEBLAcctOri gl ntegPki FLEXUBS/Canoni cal Obj ects/coCommon. xsd`
- 5 Verify that the `coCommon` schema opens correctly.

To import DVMs

- 1 Log on to ESB Control as an administrator.
- 2 Click on the map icon in the top right hand corner.
- 3 The left panel name should now be Domain Value Maps.
- 4 Click Create and choose Import a new map.
- 5 Import the DVM files from the following folder:
 CRMI NTG_HOME/SharedComponents/Utility/DVM/Maps

Defining Datasources

The following datasources need to be defined using Oracle Enterprise Manager.

To define datasources

- 1 Log in to Oracle Enterprise Manager as an administrative user.
- 2 Click oc4j_soa > Click on Administration > JDBC Resources
- 3 Create a connection pool corresponding to the datasource required.
- 4 Create datasources pointing to the above connection as detailed in the following table.

Datasource	JNDI Name	Details
CRMIIntgDataSource	jdbc/crmintg	A datasource pointing to point to the schema with the same user credentials used to execute "create_crmintgCommon_schema.sql" in the procedure "To set up common functions" on page 19.
An addition xref data source is needed in case when xref_data table has not been created under oraesb or orabpel user name.		
xref	jdbc/xref	A datasource pointing to the schema with the same user credentials used to execute "xreftables.sql" in the procedure "To set up common functions" on page 19.

Importing ID Cross-Reference Seed Data

Complete the following procedure.

To import the ID cross-reference table and column definitions

- 1 Open a command prompt or shell.
- 2 Change directory to <SOA_HOME>/integration/esb/bin
- 3 Set the following environment variables using the values for the oc4jadministrator username and password.
 - - OC4J_USERNAME
 - - OC4J_PASSWORD
- 4 Execute the following command at <SOA_HOME>/integration/esb/bin:


```
./xreftool . sh -f $CRMINTG_HOME/SharedComponents/Utility/CommonFunctions/crmintg_seed_data.txt
```

Configuring Siebel CRM

Configuring Siebel CRM to integrate with i-flex integration consists of the following tasks:

- [Applying the Quick Fix on page 21](#)
- [Configuring the Error Handler Service on page 22](#)
- [Configuring Product Synchronization on page 22](#)
- [Configuring Financial Account Origination on page 25](#)
- [Configuring Single Customer View on page 30](#)
- [Configuring Service Requests on page 37](#)

Applying the Quick Fix

You must apply Siebel 7.8.2.4 Quick Fix. This Quick Fix applies to multiple Siebel products and some of the files it contains are not applicable to this integration.

To apply the quick fix

- 1 Install Siebel Tools 7.8.2.4.
- 2 From eDelivery, download the Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products, v1.0, Siebel CRM Patches which contains the file 7.8.2.4sia_19224_W32_QF1408.zip.
- 3 Expand the downloaded file.
- 4 Navigate to [local directory]/7.8.2.4[19224]QF[Number]/Release/Windows/Client/Siebel_Tools and double click on install.exe.

Siebel Tools 7.8.2.4 is patched and the quick fix installed.

- 5 Navigate to Siebel Tools home directory and open the ABSCHANGES\ApplicationChanges\SiebelCRMSIA\7.8.2 folder.

The files required for configuration in subsequent sections are organized as per the domains.

In the remaining configuration topics there are references to SIF and XML files. These files are located in the above directory.

Configuring the Error Handler Service

To configure the error handler service, use the following procedure.

To configure the error handler service

- 1 Log in to Siebel Tools.
- 2 Navigate to Tools > Import from Archive.
- 3 Locate the following file:
`<Siebel Tools installation root>\ABSCHANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\ErrorHandler\GenesisErrorHandler.sif`
- 4 Import the file, following the prompts to complete the import. Use the Override option.
- 5 Choose Tools > Business Service.
- 6 Find Genesis Error Handler.
- 7 Compile to the repository file for your Siebel server.

Configuring Product Synchronization

To configure Siebel CRM for product synchronization, complete these tasks:

- [Importing SIF Files for Product Synchronization on page 22](#)
- [Importing Web Service Definitions for Product Synchronization on page 24](#)
- [Configuring Seed Data for Product Synchronization on page 24](#)

Importing SIF Files for Product Synchronization

To import SIF files for product synchronization, complete the following procedure.

To import SIF files for product synchronization

- 1 Log in to Siebel Tools.
- 2 If any of the following projects exist, lock them.
 - FINS Product

- iFlex Integration
 - ISS Authoring Admin
- 3 Navigate to Tools > Import from Archive.
 - 4 Browse to the following folder that contains the SIF files:
 <Siebel Tools installation root>\ABSCCHANGES\Appl icati onChanges\Siebel CRMSI A\7. 8. 2\Product
 - 5 Import each of the SIF files in the following table, following the prompts to complete the import. Use the Override option.

SIF File to Import	Repository objects	Object Type	Project	New / Updated
FINSProductDetailsSFView-RatesCRMInteg.sif	FINS Product Details SF View-Rates CRMInteg	View	iFlex Integration	New
	Internal CRMIntegSEBLSI AProductInterface		iFlex Integration	New
FINProductRates.sif	FIN Product Rates	Business Component	FINS Product	New
FINSProductRatesListAppletCRMInteg.sif	FINS Product Rates List Applet CRM Integ	Applet	iFlex Integration	New
ISS Unified Administration Screen.sif	ISS Unified Administration Screen	Screen	ISS Authoring Admin	New
SIAPProductIOs.sif	CRMIntegSEBLSI AProductInterface	Integration Object	iFlex Integration	New
	Internal CRMIntegSEBLSI AProductInterface	Integration Object	iFlex Integration	New
SIAPProductSyncBS.sif	CRMIntegSEBLSI AProductSync	Business Service	iFlex Integration	New

- 6 Choose Tools > Business Service.
- 7 Find the following objects and compile them to the repository:
 - CRMIntegSEBLSIAFinancialAccountSync
 - CRMIntegSEBLSIAProductSync
- 8 Choose Tools > Integration Object.
- 9 Find the following objects and compile them to the repository:

- CRMIntegSEBLISIAFinancialAccountInterface
- CRMIntegSEBLISIAProductInterface
- Internal CRMIntegSEBLISIAFinancialAccountInterface
- Internal CRMIntegSEBLISIAProductInterface

Importing Web Service Definitions for Product Synchronization

To import web service definitions for product synchronization, complete the following procedure.

To import web service definitions for product synchronization

- 1 Log in to the Siebel Financial Services application.
- 2 Navigate to Administration – Web Services > Inbound Web Services view.
- 3 Import the XML files listed in the following table.

XML File to Import	Web Service Name	Direction
<Siebel Tools installation root>\ABSCCHANGES\ApplicationChan ges\SiebelCRMSIA\7.8.2\Product\CRM IntegSEBLISIAProductSync.XML	CRMIntegSEBLISIAProductSync	inbound

- 4 In the Service Ports applet, update the address to point to your Siebel Application server, and update the user name and password.

For example:

```
' http://SiebelSrvrName /eai_enu/  
start.swe?SWEExtSource=WebService& SWEExtCmd=Execute& Username=username  
& Password=password'
```

- 5 Click Clear Cache.

Configuring Seed Data for Product Synchronization

To configure seed data for product synchronization, complete the following procedure.

To configure seed data for product synchronization

- 1 Log in to Siebel Tools, connecting to the same database as the Siebel Server.
- 2 Choose Screens > System Administration > List of Values.

- 3 Create a new record with the information provided in the following table.

Type	Display Value	Language-Independent Code	Language	Order
FINCORP_PROD_ADMIN_CLASS_MLOV	Checkings	Checkings	English-American	45

- 4 Click Clear Cache.

Configuring Financial Account Origination

To configure Siebel CRM for Financial Account Origination, complete these tasks:

- [Importing SIF Files for Financial Account Origination on page 25](#)
- [Importing Workflow Definitions for Financial Account Origination on page 28](#)
- [Activating Workflow Definitions for Financial Account Origination on page 28](#)
- [Importing Web Service Definitions for Financial Account Origination on page 28](#)
- [Configuring Seed Data for Financial Account Origination on page 29](#)

Importing SIF Files for Financial Account Origination

To import SIF files for financial account origination, complete the following procedure.

To import SIF files for financial account origination

- 1 Edit the tools.cfg file, changing the SymStrPrefix parameter from X_ to SBL_.
- 2 Log in to Siebel Tools.
- 3 If any of the following projects exist, lock them.
 - Division
 - FINS Application
 - FINS Application – ACAPS
 - FINS Application – ACAPS 1
 - FINS Application – ACAPS 2
 - FINS Application – ACAPS Small business
 - FINS Application (UI)
 - FINS Service Request2
 - iFlex Integration

- Oppty
- Table Person
- VERT CUT Address

- 4 Navigate to Tools > Import from Archive.
- 5 Browse to the following folder that contains the SIF files:

```
<Siebel Tools installation
root>\ABSCCHANGES\Appl icati onChanges\Siebel CRMSI A\7. 8. 2\Fi nanci al Appl icati on
```

- 6 Import each of the SIF files in the following table, following the prompts to complete the import. Use the Override option.

SIF File to Import	Repository objects	Object Type	Project	New / Updated
CRMIntegAccountOrigin ationSEBL82ToIFLEXUB S72SyncBS.sif	CRMIntegAccountOrigin ationSEBL82ToIFLEX UBS72Sync	Business Service	iFlex Integration	New
CRMIntegSEBLSIAFinan cialApplicationSync.sif	CRMIntegSEBLSIAFin ancialAccountSync	Business Service	iFlex Integration	New
CUTAddressBC.sif	CUT Address	Business Component	VERT CUT Address	New
FinancialApplicationIOs. sif	CRMIntegSEBLSIAFin ancialApplicationInter face	Integration Object	iFlex Integration	New
	CRMIntegSEBLSIAFin ancialApplicationInter face	Integration Object	iFlex Integration	New
FINSAccount-Policy- ContactsBC.sif	FINS Account - Policy - Contacts	Business Component	FINS Service Request2	New
FINSApplicationEntryAp plet-ACAPS.sif	FINS Application Entry Applet - ACAPS	Applet	FINS Application – ACAPS 1	Updated
FINSApplicationFunding Source-CashCheckApplet.sif	FINS Application Funding Source - Cash Check Applet	Applet	FINS Application (UI)	Updated
FINSApplicationFunding Source-IntraBankTransferApplet .sif	FINS Application Funding Source - IntraBank Transfer Applet	Applet	FINS Application (UI)	New
FINSApplicationFunding SourcesBC.sif	FINS Application Funding Sources	Business Component	FINS Application	Updated

SIF File to Import	Repository objects	Object Type	Project	New / Updated
Internal Division Entry Applet.sif	Internal Division Entry Applet	Applet	Division	New
Internal Division List Applet.sif	Internal Division List Applet	Applet	Division	New
InternalDivisionBC.sif	Internal Division	Business Component	Division	New
OpportunityProductBC.sif	Opportunity Product	Business Component	Oppty	New
s_contact.sif	S_CONTACT	Table	Table Person	New
SymbolicStrings.sif	SBL_REFERENCE_DOCUMENT_NUMBER	Symbolic String	Symbolic Strings	New

- 7 Browse to the following folder that contains the SIF files:

```
<Siebel Tools installation
root>\ABSCANGES\Appl icati onChanges\Siebel CRMSI A\7. 8. 2\Financi al Account
```

- 8 Import each of the SIF files in the following table, following the prompts to complete the import. Use the Override option.

SIF File to Import	Repository objects	Object Type	Project	New / Updated
FINS CF Contact Type Picklist.sif	FINS CF Contact Type Picklist	Pick List	FINS Captive Finance - Fin Acct	New
FINS CF Financial Account ContactBC.sif	FINS CF Financial Account Contact	Business Component	FINS Captive Finance - Fin Acct	New
SIAFinancialAccountIO.sif	CRMIntegSEBLSIAFinancialAccountInterface	Integration Object	iFlex Integration	New
	Internal CRMIntegSEBLSIAFinancialAccountInterface	Integration Object	iFlex Integration	New
SIAFinancialAccountSyncBS.sif	CRMIntegSEBLSIAFinancialAccountSync	Business Service	Integration	New

- 9 Compile the repository objects.

- 10 Restore the tools.cfg file back to its original state, changing the SymStrPrefix parameter from SBL_ to X_.

Importing Workflow Definitions for Financial Account Origination

To import workflow definitions for financial account origination, complete the following procedure.

To import workflow definitions for financial account origination

- 1 Log in to Siebel Tools, connecting to the same database as the Siebel Server.
- 2 If the project named iFlex Integration exists, lock it.
- 3 From the Object Explorer, navigate to Workflow Process.
- 4 For each XML file listed in the following table, complete these steps:
 - a Right-click on the list applet and choose Import Workflow Process.
 - b Browse to the XML file and import it.
 - c Query for its workflow name.
 - d In Lock Projects view > Workflow process select the record and click Deploy.

XML File to Import	Workflow Name	Project
<Siebel Tools installation root>\ABSCHANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\FinancialApplication\Workflow\CRMIntegSEBLSIAAccountOriginationOutboundFlow.xml	CRMIntegSEBLSIAAccountOriginationOutboundFlow	iFlex Integration

Activating Workflow Definitions for Financial Account Origination

To activate workflow definitions for financial account origination, complete the following procedure.

To activate workflow definitions for financial account origination

- 1 Log in to Siebel Financial Services Application.
- 2 Navigate to Administration – Business Process > Workflow Deployment view.
- 3 In the Repository Workflow Processes applet, query for the following workflows
 - CRMIntegSEBLSIAAccountOriginationOutboundFlow
- 4 For each of the workflows, select the record and click the Activate.

Importing Web Service Definitions for Financial Account Origination

To import web service definitions for financial account origination, complete the following procedure.

To import web service definitions for financial account origination

- 1 Log in to Siebel Financial Services application.
- 2 Navigate to the Administration – Web Services > Outbound Web Services view.
- 3 Import the following XML files:
 - <Siebel Tools installation
root>\ABSCHANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\FinancialApplication\[WebService]CRMIntegAccountOriginationSEBL82ToIFLEXUBS72Sync.XML
 - <Siebel Tools installation
root>\ABSCHANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\FinancialAccount\[WebService]CRMIntegSEBLSIAFinancialAccountSync.XML
- 4 Query for the following web service names:
 - CRMIntegAccountOriginationSEBL82ToIFLEXUBS72Sync
 - CRMIntegSEBLSIAFinancialAccountSync
- 5 For each of the above web services, navigate to the Service Port applet and update the address to point to your BPEL server location, change the localhost to your server machine name, and the port to the applicable port on that server.
For example:
http://localhost:8888/orabpel/default/CRMIntegUpdateCustomerSEBL782ToIFLEXSync/1.0
- 6 Click Clear Cache.

Configuring Seed Data for Financial Account Origination

To configure seed data for financial account origination, complete the following procedure.

To configure seed data for financial account origination

- 1 Login to the Siebel Financial Services application.
- 2 Navigate to the Administration – Runtime Events > Action Sets view.

- For each of the action sets in the following table, create a new action set with the information provided.

Action							
Action Set	Name	Action Type	Sequence	Active	Business Service Name	Business Service Method	Business Service Context
Account OriginationWS	1	BusService	1	Y	Workflow Process Manager	RunProcess	"ProcessName", "CRMIntegSE BLSIAAccountOrigination OutboundFlow"

- Navigate to the Events view.
- For each of the events in the following table, create a new runtime event with the information provided.

Object Type	Object Name	Event	Subevent	Action Set Name
Business Component	Opportunity	InvokeMethod	EventMethodSubmitApplication	AccountOriginationWS

- Reload runtime events.

Configuring Single Customer View

To configure Siebel CRM for Single Customer View, complete these tasks:

- [Importing SIF Files for Single Customer View on page 30](#)
- [Importing Workflow Definitions for Single Customer View on page 33](#)
- [Activating Workflow Definitions for Single Customer View on page 34](#)
- [Importing Web Service Definitions for Single Customer View on page 34](#)
- [Configuring Seed Data for Single Customer View on page 35](#)

Importing SIF Files for Single Customer View

To import SIF files for Single Customer view, complete the following procedure.

To import SIF files for Single Customer view

- Edit the tools.cfg file, changing the SymStrPrefix parameter from X_ to SBL_.

- 2 Log in to Siebel Tools.
- 3 If any of the following projects exist, lock them.
 - Contact (SSE)
 - FINS Contact
 - FINS Contact2
 - FINS Financial Accounts
 - FINS Portfolio
- 4 Navigate to Tools > Import from Archive.
- 5 Browse to the following folder that contains the SIF files:


```
<Siebel Tools installation root>\ABSCHANGES\Appl i cati onChanges\Siebel CRMSI A\7. 8. 2\Customer
```
- 6 Import each of the SIF files in the following table, following the prompts to complete the import. Use the Override option.

SIF File to Import	Repository objects	Object Type	Project	New / Updated
ContactBC.sif	Contact	Business Component	Contact	New
FINS Personal Address List Applet.sif	FINS Personal Address List Applet	Applet	FINS Contact	New
SIAContactFormApplet.sif	Contact Form Applet	Applet	Contact (SSE)	Updated
SIAContactFormAppletChild.sif	Contact Form Applet - Child	Applet	Contact (SSE)	Updated
SIAContactIO.sif	CRMIntegSEBLSIAContactInterface	Integration Object	iFlex Integration	New
	Internal CRMIntegSEBLSIAContactInterface	Integration Object	iFlex Integration	New
SIAContactSyncBS.sif	CRMIntegSEBLSIAContactSync	Business Service	iFlex Integration	New
SIAContactUpdateBS.sif	CRMIntegUpdateCustomerSEBL782ToIFELX Sync	Business Service	iFlex Integration	New
SIAFINPickListContactCitizenship.sif	FIN PickList Contact Citizenship	Pick List	FINS Contact2	Updated

- 7 Browse to the following folder that contains the SIF files:

```
<Siebel Tools Installation
root>\ABSCCHANGES\Appl icati onChanges\Si ebel CRMSI A\7. 8. 2\RequestAccountSummary
```

- 8 Import each of the SIF files in the following table, following the prompts to complete the import. Use the Override option.

SIF File to Import	Repository objects	Object Type	Project	New / Updated
Contact_FINCORPAccountSummary.sif	Contact/FINCORP Account Summary	Link	iFlex Integration	New
ContactBO.sif	Contact	Business Object	Contact	New
CRMIntegRequestAccountSummarySEBL782ToFLEXUBS72SyncBS.sif	CRMIntegRequestAccountSummarySEBL782ToFLEXUBS72SyncBS	Business Service	iFlex Integration	New

- 9 Browse to the following folder that contains the SIF files:

```
<Siebel Tools Installation
root>\ABSCCHANGES\Appl icati onChanges\Si ebel CRMSI A\7. 8. 2\RequestAccountTransaction
```

- 10 Import each of the SIF files in the following table, following the prompts to complete the import. Use the Override option.

SIF File to Import	Repository objects	Object Type	Project	New / Updated
FinancialAccountTransactionsIO.sif	CRMIntegSEBLSIAFinancialAccountTransactionInterface	Integration Object	iFlex Integration	New
FINCORPAccount_FSISITransactionDetailsLink.sif	INCORP Account/FSI Transaction Details	Link	iFlex Integration	New
FINCORPAccountBC.sif	FINCORP Account	Business Component	FINS Portfolio	Updated
FINCORPAccountBO.sif	FINCORP Account	Business Object	FINS Portfolio	Updated
FINCORPAccountSummaryBC.sif	FINCORP Account Summary	Business Component	iFlex Integration	New
FINCORPAccountTransactionsView.sif	FINCORP Account Transactions View	View	iFlex Integration	New
FINSFinancialAccountScreen.sif	FINS Financial Accounts Screen	Screen	FINS Financial Accounts	Updated
FSITransactionDetailsBC.sif	FSI Transaction Details	Business Component	iFlex Integration	New

SIF File to Import	Repository objects	Object Type	Project	New / Updated
FSITransactionsListApplet.sif	FSI Transactions List Applet	Applet	iFlex Integration	New
RequestTransactionBS.sif	CRMIntegRequestTransactionSEBL782ToIFLEXSync	Business Service	iFlex Integration	New
	CRMIntegSIATranAddVBCRoot	Business Service	iFlex Integration	New
SymbolicStrings.sif	SBL_AMOUNT_TAG	Symbolic String	Symbolic Strings	New
	SBL_DEBIT/_CREDIT	Symbolic String	Symbolic Strings	New
	SBL_VALUE_DATE	Symbolic String	Symbolic Strings	New

- 11 Choose Tools > Compile Projects.
The Object Compiler wizard appears.
- 12 Select the following projects from the object list and click Compile.
 - FINS Financial Accounts
 - FINS Portfolio
 - iFlex Integration
- 13 Restore the tools.cfg file back to its original state, changing the SymStrPrefix parameter from SBL_ to X_.

Importing Workflow Definitions for Single Customer View

To import workflow definitions for Single Customer view, complete the following procedure.

To import workflow definitions for Single Customer view

- 1 Log in to Siebel Tools, connecting to the same database as the Siebel Server.
- 2 If the project named iFlex Integration exists, lock it.
- 3 From the Object Explorer, navigate to Workflow Process.
- 4 For each XML file listed in the following table, complete these steps:
 - a Right-click on the list applet and choose Import Workflow Process.
 - b Browse to the XML file and import it.
 - c Query for its workflow name.

- d In Lock Projects view > Workflow process select the record and click Deploy.

XML File to Import	Workflow Name	Project
<Siebel Tools installation root>\ABSCHANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\Customer\[Workflow]CRMIntegSEBLSIAContactUpdateOutboundFlow.xml	CRMIntegSEBLSIAContactUpdateOutboundFlow	iFlex Integration
<Siebel Tools installation root>\ABSCHANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\RequestAccountSummary\[Workflow]CRMIntegSEBLSIARequestAccountSummaryOutboundFlow.xml	CRMIntegSEBLSIARequestAccountSummaryOutboundFlow	iFlex Integration
<Siebel Tools installation root>\ABSCHANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\RequestAccountTransaction\[Workflow]CRMIntegSEBLSIATransactionQueryOutboundFlow.xml	CRMIntegSEBLSIATransactionQueryOutboundFlow	iFlex Integration

Activating Workflow Definitions for Single Customer View

To activate workflow definitions for Single Customer view, complete the following procedure.

To activate workflow definitions for Single Customer view

- 1 Log in to Siebel Financial Services Application.
- 2 Navigate to Administration – Business Process > Workflow Deployment view.
- 3 In the Repository Workflow Processes applet, query for the following workflows
 - CRMIntegSEBLSIAContactUpdateOutboundFlow
 - CRMIntegSEBLSIARequestAccountSummaryOutboundFlow
 - CRMIntegSEBLSIATransactionQueryOutboundFlow
- 4 For each of the workflows, select the record and click the Activate.

Importing Web Service Definitions for Single Customer View

To import web service definitions for Single Customer view, complete the following procedure.

To import web service definitions for Single Customer view

- 1 Log in to Siebel Financial Services application.
- 2 Navigate to Administration - Web Services > Inbound Web Services view.

- 3 Import the following XML file:

```
<Siebel Tools installation
root>\ABSCANGES\Appl i cati onChanges\Siebel CRMSIA\7. 8. 2\Customer\[Web Servi ce]CRMI nt
egSEBLSI AContactSync. XML
```

- 4 Query for a web service with the following name:

```
CRMI ntegSEBLSI AContactSync
```

- 5 In the Service Ports applet, update the address to point to your Siebel Application server, and update the user name and password.

For example:

```
' http: //Si ebeSrvrName /eai _enu/
start. swe?SWEExtSource=Web Servi ce&SWEExtCmd=Execute& Username=username
& Password=password'
```

- 6 Navigate to the Administration – Web Services > Outbound Web Services view.

- 7 Import the following XML files:

- <Siebel Tools installation
root>\ABSCANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\RequestAccountSummary\[W
ebService]CRMI ntegRequestAccountSummarySEBL782ToIFLEXUBS72Sync.XML

- <Siebel Tools installation
root>\ABSCANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\RequestAccountTransaction\[
WebService]CRMI ntegRequestTransactionSEBL782ToIFLEXSync.XML

- <Siebel Tools installation
root>\ABSCANGES\ApplicationChanges\SiebelCRMSIA\7.8.2\Customer\[WebService]CRMI
ntegUpdateCustomerSEBL782ToIFELXSync.XML

- 8 Query for the following web service names:

- CRMI ntegRequestAccountSummarySEBL782ToIFLEXUBS72Sync

- CRMI ntegRequestTransactionSEBL782ToIFLEXSync

- CRMI ntegUpdateCustomerSEBL782ToIFELXSync

- 9 For each of the above web services, navigate to the Service Port applet and update the address to point to your BPEL server location, change the localhost to your server machine name, and the port to the applicable port on that server.

For example:

```
http: //l ocal host: 8888/orabpel /defaul t/
CRMI ntegRequestAccountSummarySEBL782ToIFLEXUBS72Sync/1. 0
```

- 10 Click Clear Cache.

Configuring Seed Data for Single Customer View

To configure seed data for Single Customer view, complete the following procedure.

To configure seed data for Single Customer view

- 1 Using a command line, launch the dedicated client using this command:
`siebel.exe /c fins.cfg /l enu /editseeddata`
- 2 Log in with administrative account.
- 3 Navigate to Admin-Application >Views.
- 4 Click New.
- 5 If the FINCORP Account Transactions View is not available in the View pick applet, then set the following fields:
 - View name = FINCORP Account Transactions View
 - Description = FINCORP Account Transactions View
 - Default Local Access = Y
- 6 In the Responsibility list applet, create a new record, select Siebel Administrator.
- 7 For each of the action sets in the following table, create a new action set with the information provided.

Action							
Action Set	Name	Action Type	Sequence	Active	Business Service Name	Business Service Method	Business Service Context
AccountSummaryWS	1	BusService	1	Y	Workflow Process Manager	RunProcess	"ProcessName", "CRMIntegSEBLSIAResquestAccountSummaryOutboundFlow"

- 8 Navigate to the Events view.
- 9 For each of the events in the following table, create a new runtime event with the information provided.

Object Type	Object Name	Event	Subevent	Action Set Name
Applet	FINS LI Contact Financial Accounts Summary List Applet	DisplayApplet		AccountSummaryWS

- 10 Reload runtime events.

Configuring Service Requests

To configure Siebel CRM for Service Requests, complete these tasks:

- [Configuring Lists of Values for Service Requests on page 37](#)
- [Importing SIF Files for Service Requests on page 38](#)
- [Importing Workflow Definitions for Service Requests on page 40](#)
- [Activating Workflow Definitions for Service Requests on page 41](#)
- [Importing Web Service Definitions for Service Requests on page 41](#)
- [Configuring Seed Data for Service Requests on page 42](#)

Configuring Lists of Values for Service Requests

To configure lists of values for service requests, complete the following procedure.

To configure lists of values for service requests

- 1 Log in to Siebel Tools, connecting to the same database as the Siebel Server.
- 2 From application level menu, choose Screens > System Administration > List of Values.
- 3 Create three new records with the information provided in the following table.

Type	Display Value	Language-Independent Code	Language	Order
FINS_TLR_TRANSACTION_ITEM	Principal	Principal	English-American	110
	Principal plus Interest	Principal plus Interest	English-American	120
	Special Amount	Special Amount	English-American	130

Type	Display Value	Language-Independent Code	Language	Order
AUTO_ASSET_CON_REL	Primary	P	English-American	24
	Secondary	S	English-American	25
	Guarantor	G	English-American	26
	Authorized Signer	Authorized Signer	English-American	27
	Joint	Joint	English-American	28
	P	Primary	English-American	29
	S	Secondary	English-American	30
	G	Guarantor	English-American	31
SR_AREA	Term Deposit Rollover	Term Deposit Rollover	English-American	See Note below.

NOTE: In the Parent LIC column choose the drop-down list. This opens a pick applet. In the pick applet query for the type value "SR_AREA". This displays the existing SR_AREA type values. Choose the SR_AREA type record with the value Bank.

- 4 Clear the cache.

Importing SIF Files for Service Requests

To import SIF files or service requests, complete the following procedure.

To import SIF files for service requests

- 1 Edit the tools.cfg file, changing the SymStrPrefix parameter from X_ to SBL_.
- 2 Log in to Siebel Tools.
- 3 If any of the following projects exist, lock them.
 - FINS Service Request2

- iFlex Integration
 - Service
 - Service (SSV)
 - Symbolic Strings
- 4 Navigate to Tools > Import from Archive.
 - 5 Browse to the following folder that contains the SIF files:
`<Siebel Tools installation root>\ABSCANGES\Appl icati onChanges\Siebel CRMSI A\7. 8. 2\ServiceRequest`
 - 6 Import each of the SIF files in the following table, following the prompts to complete the import. Use the Override option.

SIF File to Import	Repository objects	Object Type	Project	New / Updated
CRMIntegSEBLSIAServiceRequestSync.sif	CRMIntegSEBLSIAServiceRequestSync	Business Service	iFlex Integration	New
CRMIntegSubmitServiceRequestSEBL782TOIFLEXSyncBS.sif	CRMIntegSubmitServiceRequestSEBL782TOIFLEXSync	Business Service	iFlex Integration	New
FINServiceRequestAccountServiceTDRolloverView.sif	FIN Service Request Acct Services TD Rollover View	View	FINS Service Request2	New
FINServiceRequestTermDepositRolloverListApplet.sif	FIN Service Request Term Deposit Rollover List Applet	Applet	FINS Service Request2	New
FNTermDepositRolloverTypePickList.sif	FN Term Deposit Rollover Type	Pick List	iFlex Integration	New
ServiceRequestDetailApplet.sif	Service Request Detail Applet	Applet	Service (SSV)	Updated
ServiceRequestIOs.sif	CRMIntegSEBLSIAServiceRequestInterface	Integration Object	iFlex Integration	New
	Internal CRMIntegSEBLSIAServiceRequestInterface	Integration Object	iFlex Integration	New
ServiceRequestScreen.sif	Service Request Screen	Screen	Service (SSV)	Updated
SIAServiceRequest_TD RolloverLink.sif	Service Request/FIN Service Request TD Rollover	Link	FINS Service Request2	New

SIF File to Import	Repository objects	Object Type	Project	New / Updated
SIAServiceRequestBCs.sif	FIN Service Request Statement Copy	Business Component	FINS Service Request2	Updated
	FIN Service Request TD Rollover	Business Component	FINS Service Request2	New
	Service Request	Business Component	Service	Updated
SIAServiceRequestBO.sif	Service Request	Business Object	Service	Updated
StatementCopyApplets.sif	FIN Service Request Statement Copy Form Applet	Applet	FINS Service Request2	Updated
	FIN Service Request Statement Copy List Applet	Applet	FINS Service Request2	Updated
SymbolicStrings.sif	SBL_ROLLOVER_TYP E	Symbolic String	Symbolic Strings	New
	SBL_TERM_DEPOSIT _ROLLOVER	Symbolic String	Symbolic Strings	New

- 7 Choose Tools > Compile Projects.
The Object Compiler wizard appears.
- 8 Select the following projects from the object list and click Compile.
 - FINS Service Request2
 - iFlex Integration
 - Service
 - Service (SSV)
 - Symbolic Strings
- 9 Restore the tools.cfg file back to its original state, changing the SymStrPrefix parameter from SBL_ to X_.

Importing Workflow Definitions for Service Requests

To import workflow definitions for service requests, complete the following procedure.

To import workflow definitions for service requests

- 1 Log in to Siebel Tools, connecting to the same database as the Siebel Server.

- 2 If the project named iFlex Integration exists, lock it.
- 3 From the Object Explorer, navigate to Workflow Process.
- 4 Right-click on the list applet and choose Import Workflow Process.
- 5 Browse to the following XML file and import it:

```
<Siebel Tools installation
root>\ABSCCHANGES\Appl i cati onChanges\Si ebel CRMSI A\7. 8. 2\Servi ceRequest\[WorkFl ow]CR
MI ntegSEBLSI AServi ceRequestSubmi tOutboundFl ow.xml
```

- 6 Query for the following workflow name:
CRMI ntegSEBLSI AServi ceRequestSubmi tOutboundFl ow
- 7 In Lock Projects view > Workflow process select the record and click Deploy.

Activating Workflow Definitions for Service Requests

To activate workflow definitions for service requests, complete the following procedure.

To activate workflow definitions for service requests

- 1 Log in to Siebel Financial Services Application.
- 2 Navigate to Administration – Business Process > Workflow Deployment view.
- 3 In the Repository Workflow Processes applet, query for the following workflow:
CRMI ntegSEBLSI AServi ceRequestSubmi tOutboundFl ow
- 4 Select the record and click the Activate.

Importing Web Service Definitions for Service Requests

To import web service definitions for service requests, complete the following procedure.

To import web service definitions for service requests

- 1 Log in to Siebel Financial Services application.
- 2 Navigate to the Administration – Web Services > Outbound Web Services view.
- 3 Import the following XML file:

```
<Siebel Tools installation
root>\ABSCCHANGES\Appl i cati onChanges\Si ebel CRMSI A\7. 8. 2\Servi ceRequest\[WebServi ce]
CRMI ntegSubmi tServi ceRequestSEBL782ToI FLEXSync.XML
```
- 4 Query for the following web service name:
CRMI ntegSubmi tServi ceRequestSEBL782ToI FLEXSync

- 5 Navigate to the Service Port applet and update the address to point to your BPEL server location, change the localhost to your server machine name, and the port to the applicable port on that server.

For example:

```
http://localhost:8888/orabpel/default/  
CRMIntegSubmitServiceRequestSEBL782ToFLEXSync/1.0
```

- 6 Click Clear Cache.

Configuring Seed Data for Service Requests

To configure seed data for service requests, complete the following procedure.

To configure seed data for service requests

- 1 From a command prompt, launch the dedicated client application using this command:

```
siebel.exe /c fins.cfg /l enu /editseeddata
```
- 2 Log in with an administrative account.
- 3 Navigate to Admin-Application > Views.
- 4 Create a new record by clicking New.
- 5 If the FIN Service Request Acct Services TD Rollover View is not available in the View pick applet then set the following fields:
 - View name = FIN Service Request Acct Services TD Rollover View
 - Description = FIN Service Request Acct Services TD Rollover View
 - Default Local Access = Y
- 6 On the Responsibility list applet, create a new record, select Siebel Administrator.
- 7 Create a new record by clicking New.
- 8 If the FINS Product Details SF View-Rates CRMInteg view is not available in the View pick applet then set the following fields:
 - View name = FINS Product Details SF View-Rates CRMInteg
 - Description = FINS Product Details SF View-Rates CRMInteg
 - Default Local Access = Y
- 9 On the Responsibility list applet, create a new record, select Siebel Administrator.
- 10 Log in to the Siebel Financial Services application.
- 11 Navigate to the Administration – Runtime Events > Action Sets view.

- 12 For each of the action sets in the following table, create a new action set with the information provided.

Action							
Action Set	Name	Action Type	Sequence	Active	Business Service Name	Business Service Method	Business Service Context
ServiceRequestWS	1	BusService	1	Y	Workflow Process Manager	RunProcess	"ProcessName", "CRMIntegSEBLSIAServiceRequestSubmitOutboundFlow"

- 13 Navigate to the Events view.
- 14 For each of the events in the following table, create a new runtime event with the information provided.

Object Type	Object Name	Event	Subevent	Action Set Name
BusComp	Service Request	InvokeMethod	EventMethodSubmitRequest	ServiceRequestWS

- 15 Reload runtime events.

Configuring Business Processes Execution Language

To configure BPEL for Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products, complete the following procedures in the specified order:

- [Setting Up Domain Value Maps on page 43](#)
- [Configuring CRMIntegProcessParametersAO.xml on page 44](#)
- [Configuring the Business Processes Execution Language Process on page 45](#)
- [Deploying Business Processes Execution Language Processes on page 46](#)

Setting Up Domain Value Maps

To set up domain value maps, complete the following procedure.

To set up domain value maps

- 1 Connect to `http://SOAHost:port/esb` and log in.
- 2 Click on the maps icon.
- 3 Click Create > Import a new map.
- 4 Locate each of the following files and import them.
 - APPLICANT TPYE.xml
 - COUNTRY.XML
 - CURRENCY CODE.xml
 - FINANCIAL ACCOUNT ADDRESS TYPE.xml
 - FINANCIAL ACCOUNT CUSTOMER TYPE.xml
 - FINANCIAL ACCOUNT STATUS.xml
 - FINANCIAL ACCOUNT TYPE.xml
 - LANGUAGE CODE.xml
 - NATIONALITY.xml
 - PRODUCT STATUS.XML

Configuring CRMIntegProcessParametersAO.xml

To configure CRMIntegProcessParameters.xml complete the following procedure.

To configure CRMIntegProcessParametersAO.xml

- 1 Locate the following file:

CRM NTG_HOME\SetUp\CRMIntegProcessParametersAO.xml

- 2 Replace the existing content with the following:

```
<?xml version="1.0" encoding="UTF-8" ?>
- <LISTOFBUILDPARAMETERS xmlns="http://www.siebel.com/uan/SiebelBIAs/
SharedComponents/CRMIntegProcessProperties">
- <BUILDPARAMETER>
  <property name="PARAMNAME">http://127.0.0.1:7777/orabpel/default</property>
  <property name="PARAMVALUE">http://sdchs20n570.corp.siebel.com:7777/orabpel/
default</property>
  <property name="DESC">This Parameter is to capture BPEL domain URL
information. Please specify your environment specific value for "PARAMVALUE"
property. Here "http://127.0.0.1:7777" should be replaced with the HOST, PORT where
the BPEL PM is running. "orabpel" should stay same. "default" is the name of domain
where the bpel processes are to be deployed.</property>
</BUILDPARAMETER>
```

```

- <BUILDPARAMETER>
  <property name="PARAMNAME">http://127.0.0.1:7777/orappel/xmllib</property>
  <property name="PARAMVALUE">http://sdchs20n570.corp.siebel.com:7777/orappel/
xml lib</property>
  <property name="DESC">This Parameter is to capture the XMLLIB url. Please
specify your environment specific value for "PARAMVALUE" property. Here "http://
127.0.0.1:7777" should be replaced with the HOST, PORT where the BPEL PM is runni
ng. "orappel/xml lib" should stay same.</property>
</BUILDPARAMETER>

- <BUILDPARAMETER>
  <property name="PARAMNAME">http://127.0.0.1/eai_enu/start.swe</property>
  <property name="PARAMVALUE">http://siebwebsvrhost:port/eai_enu/start.swe</
property>
  <property name="DESC">This Parameter is to capture the Siebel Web Server.
Please specify your environment specific value for "PARAMVALUE" property. Here
"http://127.0.0.1" should be replaced with the HOST, PORT where the Siebel web server
is runni ng.</property>
</BUILDPARAMETER>

- <BUILDPARAMETER>
  <property name="PARAMNAME">UserName=SADMIN</property>
  <property name="PARAMVALUE">UserName=username</property>
  <property name="DESC">This Parameter is to capture the user name for siebel
authenti cation. Please specify your environment speci fic value for "PARAMVALUE"
property.</property>
</BUILDPARAMETER>

- <BUILDPARAMETER>
  <property name="PARAMNAME">Password=MSSQL</property>
  <property name="PARAMVALUE">Password=password</property>
  <property name="DESC">This Parameter is to capture the password of the user
for Siebel authenti cation. Please specify your environment speci fic value for
"PARAMVALUE" property.</property>
</BUILDPARAMETER>

</LISTOFBUILDPARAMETERS>

```

- 3 Save the file.

Configuring the Business Processes Execution Language Process

To configure the BPEL process complete the following procedure.

To configure the Business Processes Execution Language process from the build

- 1 From a command window, navigate to this folder:

```
\CRM\NTEG_HOME\SetUp\BusinessProcesses
```

- 2 Run following command to search and replace in BPEL processes with the values that you have specified in CRMIntegProcessParametersAO.xml:

```
java -jar CRMNTEG_HOME\Setup\scripts\EditParam.jar -i [Project Root] -f  
[CRMIntegProcessParametersAO.xml Location] -verbose -t D:\temp
```

For example:

```
java -jar CRMNTEG_HOME\Setup\scripts\EditParam.jar -i  
d:\BPELProjects\SEBLAcctOrigIntegPKIFLEXUBS\BusinessProcesses -f  
d:\BPELProjects\SEBLAcctOrigIntegPKIFLEXUBS\Setup\CRMIntegProcessParametersAO.xml  
-verbose -t D:\temp
```

Replace "D:\temp" with an existing temp directory.

- 3 Verify the result by opening this file:

```
\Customer\CRMIntegFetchCustomerIFLEXUBS72ToSEBL782Sync\bpel\CRMIntegSEBLSIAContact  
Sync.wsdl under SEBLAcctOrigIntegPKIFLEXUBS\BusinessProcesses
```

- 4 Verify that at the bottom of the file, the soap address has changed from:

```
"<soap:address location="http://localhost:8080/eai_enu/  
start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName=YOUR_  
ACCOUNT&Password=YOUR_PASSWORD"/>"
```

to:

```
"<soap:address location="http://siebelWebSrvrHost:port/eai_enu/  
start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName=YOUR_  
ACCOUNT&Password=YOUR_PASSWORD"/>"
```

Deploying Business Processes Execution Language Processes

The list of BPEL processes to be deployed is provided below. The processes are ordered in the recommended sequence of deployment. There are two methods to deploy the BPEL processes. Choose either:

- 1 Deployment using an Ant script on Linux or Windows.
- 2 Deployment using Jdeveloper.

To deploy using an ANT script on Linux

- 1 Locate the following folder: SEBLAcctOrigIntegPKIFLEXUBS
- 2 Copy this folder into the following location:
- 3 <SOA Home>/bpel/samples
- 4 Navigate to the following folder:
<SOA Home>/bpel/samples/SEBLAcctOrigIntegPKIFLEXUBS/BusinessProcesses

- 5 From a command prompt run ant.
Ant runs a script that deploys the BPEL processes.

To deploy using an ANT script on Windows

- 1 Open a command prompt window.
- 2 Open the following file and verify the admin.user and admin.password values are correct:
SOA_HOME\bpel\utilities\ant-orabpel.properties
- 3 Navigate to <SOA Home>/bpel/bin/.
- 4 Run this file: devprompt.bat.
- 5 Navigate to the following folder:
CRMI NTG_HOME\Busi nessProcesses
- 6 From the command prompt run ant.
Ant runs a script that deploys the BPEL processes.

To deploy using JDeveloper

- 1 Start Oracle JDeveloper.
- 2 Click the Applications Navigator tab.
- 3 Right click on Applications.
- 4 Choose New and specify the type as Application.
- 5 Specify the following name for the application:
AcctOri g
- 6 Specify the following directory name as where the processes are stored.
\BPELProj ects\SEBLAcct0ri gl ntegPkl FLEXUBS\Busi nessProcesses
- 7 In the Create Project popup, click Cancel.
- 8 In the application AcctOrig, right click and choose Add to <ApplicationName>.jws.
- 9 Browse to this folder:
CRMI NTEG_HOME/Busi nessProcesses
- 10 For each file in the following list, select the file and click Open.
 - CRMIntegAccountOriginationSEBL82ToIFLEXUBS72Sync
 - CRMIntegFetchCustomerIFLEXUBS72ToSEBL782Sync
 - CRMIntegRequestAccountSummarySEBL782ToIFLEXUBS72Sync
 - CRMIntegRequestTransactionSEBL782ToIFLEXSync
 - CRMIntegSubmitServiceRequestSEBL782ToIFLEXSync

- CRMIntegSynchronizeFinancialAccountIFLEXUSBS72ToSEBL782Sync
- CRMIntegSynchronizeProductIFLEXTToSEBL782Sync
- CRMIntegUpdateCustomerSEBL782ToIFLEXUBS72Sync

Configuring i-flex FLEXCUBE

Installation of the FLEXCUBE components are documented in the FLEXCUBE release documents.

To install i-flex FLEXCUBE components

- 1 Copy the contents of the FLEXCUBE installables from the CD.
- 2 Consolidate the sources from the following releases in the order in which they are given below:
 - a FC UBS V.UM 7.1.0.0.0.0.0
 - b FC_UBS_V.UM_7.2.0.0.0.0.0_LOT1
 - c FC UBS V.UM 7.2.0.0.0.0.0Interim.1
 - d FCUBSV.UM7.2.0.0.0.0.0INTERIM.1.1

After consolidation, the root folder in which the units are present is referred to as <<FCCROOT>>

- 3 Locate the FLEXCUBE installation folder:
<<FCCROOT>>\INSTALL-DOCS
- 4 Unzip all install documents.
- 5 Configuring i-flex FLEXCUBE for Siebel CRM involves the following:
 - Installation of FCUBS Database components
 - Installation of FCUBS Forms on Application server
 - Installation of FCUBS EJB Component
 - Installation of FCUBS Web Service Component
 - Installation of FCUBS Notify Timer_MDB Component
 - Installation of FCUBS Notify MDB Component
 - Installation of FCUBS BPEL Process
 - Installation of database components required for this integration
 - FLEXCUBE maintenances that are specifically required for this integration

For the installation of i-flex FLEXCUBE Host database, refer to FCHOSTDB_Installation.doc.

For the installation of i-flex FLEXCUBE Forms front-end, refer to FCHOSTAS_Installation_10gAS_Unix.doc.

For the installation of all other components refer to SIEBELCRM-
IFLEXUBS_Installation_Document.doc

4

Data Loading

In the integration between i-flex FLEXCUBE and Siebel CRM, the ownership of data is very clear. Siebel CRM is the master for customer information and i-flex FLEXCUBE is the master for products and accounts. Before you can use this integration you must complete an initial load of product, account (savings/current/term deposit) and customers information into Siebel CRM.

This chapter contains the following sections:

- [Extracting Data from i-flex FLEXCUBE on page 51](#)
- [Loading Data into Siebel CRM on page 54](#)

Extracting Data from i-flex FLEXCUBE

Before you can use Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products, you must populate Siebel CRM with data from i-flex FLEXCUBE. The following topics describe how to extract the data.

- [Extracting Product Data on page 51](#)
- [Extracting Customer Data on page 52](#)
- [Extracting Account Data on page 53](#)

Extracting Product Data

The FCUBS Gateway infrastructure needs to be installed and configured. The products to be extracted are:

- Account Class that are used for Savings/Current and Term Deposits
- Consumer Lending loan product

To extract product data

- 1 Identify the products that need to be sent to Siebel CRM.
- 2 Log in to FLEXCUBE
- 3 Change the branch to the head office.
- 4 Navigate to Customer Maintenance > Account Class > Detailed.
- 5 Double click on the Detailed node.
- 6 For each product to be extracted, repeat these steps:
 - a Locate the Account Class name that needs to be extracted.

- b** Unlock the record, do not make any other changes, and save it.
- c** Log in to FLEXCUBE using another id and navigate to the Account Class screen.
- d** Locate the Account Class name that was unlocked in [Step b](#) and authorize the record.

The FCUBS Gateway infrastructure builds the details of the above Account Class in an XML message as per the Canonical Object format and Siebel BPEL process for consuming Product details are invoked. Subsequently, the Siebel BPEL process creates the product in Siebel. At the end of this step, both extraction as well as upload of product data are completed.

To extract consumer loan product data

- 1** Identify the Loan products that need to be sent to Siebel CRM.
- 2** Log in to FLEXCUBE.
- 3** Change the branch to the head office.
- 4** Navigate to Retail Lending > Product > Detailed.
- 5** Double click on the Detailed node.
- 6** For each item to be extracted, repeat these steps:
 - a** Navigate to the Loan product name that needs to be extracted
 - b** Unlock the record, do not make any other changes, and save it.
 - c** Log in to FLEXCUBE using another id and navigate to the Loan product screen.
 - d** Locate the Loan product name that was unlocked in [Step b](#) and authorize the record.

The FCUBS Gateway infrastructure builds the details of the above Loan product in an XML message as per the Canonical Object format and Siebel BPEL process for consuming Product details are invoked. Subsequently, the Siebel BPEL process creates the product in Siebel. At the end of this step, both extraction as well as upload of product data are completed.

Extracting Customer Data

Use the following procedure to extract customer data from i-flex FLEXCUBE.

To extract customer data

- 1** Log in to the FLEXCUBE schema using the SQL Plus client.
- 2** Run the following script:

```
<<FCC ROOT>>\Adapters\SI EBEL-CRM\SQL\Customer-Extract.sql
```

The script prompts for a folder name where it can create its output file.
- 3** Enter the name of a folder, making sure that the user running the Oracle database has rights to create a file in that folder.

The script creates an extract file with the following name:

FCUBS73_SIEBEL782_Customer_Extract.txt

- 4 Give the generated file to the Siebel implementation team who load it into Siebel CRM.

Extracting Account Data

To extract account data, use the following procedures:

- [To extract savings and current accounts data on page 53](#)
- [To extract term deposit accounts data on page 53](#)
- [To extract Consumer Loan data on page 53](#)

To extract savings and current accounts data

- 1 Log in to the FLEXCUBE schema using the SQL Plus client.
- 2 Run the following script:

```
<<FCC ROOT>>\Adapters\SIEBEL-CRM\SQL\Savings-Ascii-Extract.SQL
```

The script prompts for a folder name where it can create its output file.

- 3 Enter the name of a folder, making sure that the user running the Oracle database has rights to create a file in that folder.

The script creates an extract file with the following name:

```
FCUBS73_SIEBEL782_Savings_Current_Acc_Extract.txt
```

- 4 Give the generated file to the Siebel implementation team who load it into Siebel CRM.

To extract term deposit accounts data

- 1 Log in to the FLEXCUBE schema using the SQL Plus client.
- 2 Run the following script:

```
<<FCC ROOT>>\Adapters\SIEBEL-CRM\SQL\TD-Ascii-Extract.SQL
```

The script prompts for a folder name where it can create its output file.

- 3 Enter the name of a folder, making sure that the user running the Oracle database has rights to create a file in that folder.

The script creates an extract file with the following name:

```
FCUBS73_SIEBEL782_TermDeposit_Extract.txt
```

- 4 Give the generated file to the Siebel implementation team who load it into Siebel CRM.

To extract Consumer Loan data

- 1 Log in to the FLEXCUBE schema using the SQL Plus client.

2 Run the following script:

```
<<FCC ROOT>>\Adapters\Siebel-CRM\SQL\ConsumerLoans-Ascii-Extract.sql
```

The script prompts for a folder name where it can create its output file.

- 1 Enter the name of a folder, making sure that the user running the Oracle database has rights to create a file in that folder.

The script creates an extract file with the following name:

```
FCUBS72_Siebel782_ConsumerLoans_Extract.txt
```

- 2 Give the generated file to the Siebel implementation team who load it into Siebel CRM.

Loading Data into Siebel CRM

The extracted data can be loaded into Siebel CRM. Read the following sections for more information:

- [Loading Branch Details on page 54](#)
- [Loading Product Data on page 54](#)
- [Loading Contact Data on page 54](#)
- [Loading Account Data on page 62](#)

Loading Branch Details

To load account data follow this procedure.

To load branch details

- 1 The implementation team identifies the branches in i-flex FLEXCUBE that need to be created in Siebel CRM.
- 2 The list of branch codes are communicated to the Siebel implementation team who create them in Siebel CRM.

Loading Product Data

The extract process ([Extracting Product Data on page 51](#)) creates an XML file of product data from i-flex FLEXCUBE and synchronizes it with Siebel CRM. No additional loading of product data is necessary.

Loading Contact Data

To load contact data follow these procedures:

- To load contact data into Siebel EIM on page 55
- To create contact cross-references on page 57
- To prepare for importing contact data on page 58
- To load contact data from Siebel EIM into the Siebel database on page 59

NOTE: Make sure you have loaded branch data (“Loading Branch Details” on page 54) and product data (“Loading Product Data” on page 54) before loading contact data, otherwise the EIM scripts cannot run successfully.

To load contact data into Siebel EIM

- 1 Start the Oracle database on a local machine.
- 2 Make sure the remote Oracle database for Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products is running.
- 3 Log in to Oracle Warehouse Builder.
- 4 Navigate to Design > Import.
- 5 Import the Contact project file:
 - INTG_IFLEX_SIEBEL_CONTACTS.mdl
- 6 Start SQL Plus.
- 7 Connect to the local Oracle database and log in.
- 8 For each of the following tables, repeat these steps:
 - EIM_FN_CONTACT1
 - LANGUAGE_MAP
 - NATIONALITY_MAP
 - EIM_CONADDR_CUT
 - EIM_CONTACT
 - COUNTRY_MAP
 - PER_TITLE_MAP
 - a In SQL Plus, run this command: "desc <table name>".
 - b If the table exists, run this command to clean the table: "delete from <table name>".
 - c Otherwise, in OWB and Project Explorer, go to <INTG_IFLEX_SIEBEL_CONTACT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Tables>/<table name>, right click to validate, generate, and deploy the table.
- 9 Navigate to <INTG_IFLEX_SIEBEL_CONTACT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Sequences>/<INTG_SEQ_ROW_ID >, right click to validate, generate, and deploy.

- 10 Navigate to <INTG_IFLEX_SIEBEL_CONTACT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Transformations>/<Functions>/<f(x) SUBSTR_COUNTRY, TRANS_ADDRESSTYPE, TRANS_CONTACTTYPE, right click to validate, generate, and deploy.
- 11 In Connection Explorer, navigate to <Files>/<INTG_IFLEX_CONTACT_FILE_LOC>, right click and open editor, make sure the IFLEX text data file is located in the path.
- 12 Navigate to <Files>/<INTG_FILEX_DVM_FILE_LOC>, make sure the following files are located in the path:
 - COUNTRY_MAP.csv
 - LANGUAGE_MAP.csv
 - NATIONALITY_MAP.csv
 - PER_TITLE_MAP.csv
- 13 Navigate to <INTG_IFLEX_SIEBEL_CONTACT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Mappings>/.
- 14 For each of the following files, right click to validate the file, generate, and deploy.
 - INTG_IFLEX_SIEBEL_ CONTACT
 - IMPORT_LANGUAGE_CODE_DVM
 - IMPORT_NATIONALITY_DVM
 - IMPORT_COUNTRY_DVM
 - INTG_CONTACT1_LOC_TO_RMT
 - INTG_CONADDR_LOC_TO_RMT
 - IMPORT_PER_TITLE_DVM
 - INTG_EIM_CONTACT_LOC_TO_RMT
- 15 In Project Explorer, navigate to <INTG_IFLEX_SIEBEL_ CONTACT >/<Experts>/<INTG_IFLEX_SEBL_ CONTACT >/<INTLOAD_FLOW>, right click to validate, generate.
- 16 Navigate to Design > Save All and then start the OWB Expert.

The EIM_FN_ CONTACT 1 table and the mappings are deployed.
- 17 In the OWB main menu, navigate to <Tools>/<Control Center Manager>.
- 18 Open the Control Center Manager.
- 19 In Control Center Manger, navigate to <INTG_IFLEX_SIEBEL_ CONTACT>/<REP_USER_LOCATION>/<INTG_LOCAL_MODULE>/<Mappings>/<INTG_IFLEX_SIEBEL_ CONTACT>, right click and start.
- 20 Wait for the job to complete successfully.
- 21 In SQL Plus, run the following commands to verify the data is loaded:
 - "select count (*) from EIM_FN_CONTACT1;"
 - "select count (*) from EIM_CONADDR_CUT;"

- "select count (*) from EIM_CONTACT;"

Each of the tables should have some rows present.

- 22 In Control Center Manager, navigate to <INTG_IFLEX_SIEBEL_CONTACT>/<REP_USER_LOCATION>/<INTG_LOCAL_MODULE>/<Mappings>/.
- 23 For each of the following files, right click to validate the file, generate, and deploy.
 - IMPORT_LANGUAGE_CODE_DVM
 - IMPORT_COUNTRY_DVM
 - IMPORT_PER_TITLE_DVM
 - IMPORT_NATIONALITY_DVM
- 24 In Control Center Manager, navigate to <INTG_IFLEX_SIEBEL_CONTACT>/<REP_USER_LOCATION>/<INTG_LOCAL_MODULE>/<Mappings>/.
- 25 For each of the following mappings, complete the following steps:
 - INTG_CONTACT1_LOC_TO_RMT
 - INTG_CONADDR_LOC_TO_RMT
 - INTG_EIM_CONTACT_LOC_TO_RMT
 - a Right click the mapping and start the job.
 - b Wait for the job to complete successfully.
- 26 In SQL Plus connect to the remote database.
- 27 Run these commands to verify the data is loaded:
 - "select count (*) from EIM_FN_CONTACT1;"
 - "select count (*) from EIM_CONADDR_CUT;"
 - "select count (*) from EIM_CONTACT;"

Each of the tables should have some rows present.

To create contact cross-references

- 1 Start the Oracle database on a local machine.
- 2 Make sure the remote Oracle database for Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products is running.
- 3 Log in to Oracle Warehouse Builder.
- 4 Navigate to Design > Import.
- 5 Import the Contact project file:
 - INTG_IFLEX_SIEBEL_CONTACT_XREF.mdl
- 6 Start SQL Plus.
- 7 Connect to the local Oracle database and log in.

- 8 Run this command to check if XREF_DATA exists:
 - "desc XREF_DATA"
- 9 If the data does not exist, follow these steps:
 - a In OWB and Project Explorer, navigate to <INTG_IFLEX_SIEBEL_CONTACT_XREF>/<Databases>/<Oracle>/<SEBL_LOCAL_MODULE>/<Tables>/<XREF_DATA>.
 - b Right click to validate, generate, and deploy the table.
- 10 Run this command to check if XREF_DATA_FLAT exists:
 - "desc XREF_DATA_FLAT"
- 11 If the data does not exist, follow these steps:
 - a In OWB and Project Explorer, navigate to <INTG_IFLEX_SIEBEL_CONTACT_XREF>/<Databases>/<Oracle>/<SEBL_LOCAL_MODULE>/<Tables>/<XREF_DATA_FLAT>.
 - b Right click to validate, generate, and deploy the table.
- 12 Navigate to <INTG_IFLEX_SIEBEL_CONTACT_XREF>/<Databases>/<Oracle>/<SEBL_LOCAL_MODULE>/<Sequences>/<COM_ID_SEQ_CONT>, right click to validate, generate, and deploy.
- 13 Navigate to <INTG_IFLEX_SIEBEL_CONTACT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Transformations>/<Functions>/<f(x) TRANS_CONCAT_COMMONID>, right click to validate, generate, and deploy.
- 14 In Project Explorer, navigate to <INTG_IFLEX_SIEBEL_CONTACT_XREF>/<Experts>/<INTG_IFLEX_SEBL_CONTACT_XREF>/<INTLOAD_FLOW>, right click to validate and generate.
- 15 Navigate to Design > Save All and then start the OWB Expert.

If there are no errors, a PASS message displays. The XREF_DATA table and mapping objects are deployed.
- 16 In the OWB main menu, navigate to <Tools>/<Control Center Manager>.
- 17 Open the Control Center Manager.
- 18 In Control Center Manger, navigate to <INTG_IFLEX_SIEBEL_CONTACT_XREF>/<REP_USER_LOCATION>/<SEBL_CONTACT_XREF>/<Mappings>/<CONTACT_XREF>, right click and start.
- 19 Wait for the job to complete successfully.
- 20 In SQL Plus, connect to the local database.
- 21 Run this command:
 - "select count(*) from xref_data"

The table should have some rows present.

To prepare for importing contact data

- 1 Stop the Siebel server.
- 2 Open Siebel Tools.

- 3 Locate the S_CONTACT table.
- 4 Search for PREF_LANG_ID and remove values in <LOV TYPE> and <LOV Bounded>.
- 5 Compile the S_CONTACT object.
- 6 Click Apply.
- 7 Locate and remove the following file:
`$SIEBEL_SERVER\INSTALL_DIRECTORY\siebsrvr\bin\discache.dat`
- 8 Restart the Siebel server.

To load contact data from Siebel EIM into the Siebel database

- 1 Open a DOS command window.
- 2 Get the IF_ROW_BATCH_NUM from OWB.
- 3 Change directory to siebsrvr\bin.
- 4 Log in to odbcsql.
- 5 Run the following insert statements to populate EIM_FN_CONTACT1:
`SELECT * FROM XXXX.EIM_FN_CONTACT1 T1 WHERE T1. IF_ROW_BATCH_NUM = <FROM OWB>`
 SQL should return records that have been inserted by the OWB script.
- 6 From a DOS command lines start the server manager using this command.
 - `Srvrmgr /e <enterprise> /g <gateway name> /s <siebsrvr name> /u SADMIN /p <password>`
- 7 In srvrmgr, enable the component group EAI, if it is not already enabled and restart siebsrvr. For example:
 - `srvrmgr> enable compgrp eai`
 - `restart siebsrvr`
- 8 Run the following commands to set log file options:
 - `change params traceflags=1, errorflags=1, sqlflags=8 for comp eim`
 - `CHANGE EVTLOGLVL EIMTRACE=3 FOR COMP EIM`
 - `CHANGE EVTLOGLVL EIMSQL=4 FOR COMP EIM`

NOTE: The following commands requires the Notepad application. Do not use WordPad as it causes problems with text formatting.

- 9 Open Notepad.
- 10 Enter following lines into Notepad and save file as siebsrvr\admin\iflex_contact_load.ifb.
`[Siebel Interface Manager]`
`PROCESS = Import Contacts`

```
[Import Contacts]
TYPE = IMPORT
BATCH = 1000
TABLE = EIM_FN_CONTACT1
ONLY BASE TABLES = S_PARTY, S_CONTACT, S_POSTN_CON
FIXED COLUMN = CON_ACTIVE_FLG , "N"
FIXED COLUMN = CON_COURT_PAY_FLG , "N"
FIXED COLUMN = CON_DISACLEANSEFLG, "N"
FIXED COLUMN = CON_DSPIMGAUTHFLG , "N"
FIXED COLUMN = CON_EMAILSRUPD_FLG , "N"
FIXED COLUMN = CON_EMP_FLG , "N"
FIXED COLUMN = CON_INVSTGTR_FLG, "N"
FIXED COLUMN = CON_PO_PAY_FLG , "N"
FIXED COLUMN = CON_PRIV_FLG , "N"
FIXED COLUMN = CON_PROSPECT_FLG , "N"
FIXED COLUMN = CON_PTSHPCONTACTFL, "N"
FIXED COLUMN = CON_PTSHPKYCONFLG , "N"
FIXED COLUMN = CON_SEND_SURVEYFLG , "N"
FIXED COLUMN = CON_SPEAKER_FLG , "N"
FIXED COLUMN = CON_SUPPRESSEDMAILF, "N"
FIXED COLUMN = CON_SUPPRESSFAXFLG , "N"
FIXED COLUMN = CON_SUSPECT_FLG , "N"
FIXED COLUMN = ROOT_PARTY_FLG , "N"
FIXED COLUMN = PC_POSTN_NAME, "Siebel Administrator"
FIXED COLUMN = PC_POSTN_BU, "Default Organization"
FIXED COLUMN = PC_POSTN_LOC, "INTERNAL"
FIXED COLUMN = PC_POSTN_DIVN, "Siebel Administration"
FIXED COLUMN = CON_PR_POSTN, "Y"
FIXED COLUMN = PC_ROW_STATUS, "Y"
```

11 Open Notepad.

12 Enter following lines into Notepad and save file as siebsrvr\admin\iflex_conaddr_load.ifb.

```
[Siebel Interface Manager]
PROCESS = Import Conaddr

[Import Conaddr]
TYPE = IMPORT
BATCH = 1000
TABLE = EIM_CONADDR_CUT
ONLY BASE TABLES = S_ADDR_PER
FIXED COLUMN = ADDR_CON_PRIV_FLG, "N"
FIXED COLUMN = ADDR_DISACLEANSEFL, "N"
FIXED COLUMN = ADDR_NAME_LOCK_FLG, "N"
FIXED COLUMN = ADDR_PREMISE_FLG, "N"
FIXED COLUMN = ADDR_CON_BU, "Default Organization"
```

13 Open Notepad.

14 Enter following lines into Notepad and save file as siebsrvr\admin\iflex_eim_contact_load.ifb.

```
[Siebel Interface Manager]
PROCESS = Import Contacts
```

```
[Import Contacts]
TYPE = IMPORT
BATCH = 1000
TABLE = EIM_CONTACT
ONLY BASE TABLES = S_PARTY, S_CONTACT, S_CONTACT_BU, S_CON_ADDR
FIXED COLUMN = CON_EMP_FLG, "N"
FIXED COLUMN = PC_ROW_STATUS, "Y"
FIXED COLUMN = CON_ADDR_ACTV_FLG, "N"
FIXED COLUMN = CON_BL_ADDR_FLG, "N"
FIXED COLUMN = CON_FRAUD_FLG, "N"
FIXED COLUMN = CON_MAIN_ADDR_FLG, "N"
FIXED COLUMN = CON_RELATIONTYPEPC1, "ContactPointUsage "
FIXED COLUMN = CON_SHIP_ADDR_FLG, "N"
FIXED COLUMN = CON_PR_PER_ADDR, "Y"
FIXED COLUMN = CON_ADDR_BU, "Default Organization"
```

15 Change the PREF_LANG_ID configuration as follows:

- a** Stop the Siebel server.
- b** Open Siebel Tools.
- c** Navigate to <table> and search for S_CONTACT.
- d** Search for PREF_LANG_ID and remove the values in the <LOV TYPE> and <LOV Bounded> fields.
- e** Compile the S_CONTACT object.
- f** Click Apply.
- g** At a command prompt, navigate to the following folder:
 \$SIEBEL_SERVER_INSTALL_DIRECTORY/ses/siebsrvr/bin
- h** Remove the file named diccache.dat.
- i** Restart the Siebel server.

16 Log in to server manager.

17 Run EIM import using the following commands:

- Start task for comp eim with config=iflex_contact_load.ifb
- Start task for comp eim with config=iflex_conaddr_load.ifb
- Start task for comp eim with config=iflex_eim_contact_load.ifb

18 When the import is complete, check the EIM log file from siebsrvr\log to make sure records have been imported into the appropriate Siebel base tables such as S_CONTACT, S_ADDR_PER, and so on.

19 To display the imported records, run the following command:

- Select IF_ROW_STAT from EIM_FN_CONTACT1 where IF_ROW_BATCH_NUM=<FROM OWB>; IF_ROW_STAT should have the value IMPORTED for all imported records.

Setting the Language Field

Make sure the Language field is set for each imported contact.

To set the Language field

- 1 Log in to the Siebel application.
- 2 Navigate to the Contact screen.
- 3 For each imported contact, query for the Contact.
- 4 Drill down on the LastName.
- 5 Navigate to Consumer Profile>Personal view.
- 6 Set the Language field as appropriate for the contact.

Loading Account Data

To load account data follow these procedures:

- [To load account data into Siebel EIM on page 62](#)
- [To create account cross-references in Siebel EIM on page 64](#)
- [To load account data from Siebel EIM into the Siebel database on page 66](#)

NOTE: Make sure you have loaded branch data (“Loading Branch Details” on page 54), product data (“Loading Product Data” on page 54), and contact data (“Loading Contact Data” on page 54), before loading account data.

To load account data into Siebel EIM

- 1 Start the Oracle database on a local machine.
- 2 Make sure the remote Oracle database for Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products is running.
- 3 Log in to Oracle Warehouse Builder.
- 4 Navigate to Design > Import.
- 5 Import the Account project file:
INTG_I FLEX_SIEBEL_FINANCIAL_ACCOUNT.mdl
- 6 Start SQL Plus.
- 7 Connect to the local Oracle database.
- 8 For each of the following tables, repeat these steps:
 - EIM_FN_ASSET
 - EIM_FN_ASSET1
 - APPLICANT_TYPE_MAP

- COUNTRY_MAP
 - EIM_ASSET1
 - a In SQL Plus, run this command: "desc <table name>".
 - b If the table exists, run this command to clean the table: "delete from <table name>".
 - c Otherwise, in OWB and Project Explorer, go to <INTG_IFLEX_SIEBEL_ACCOUNT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Tables>/<table name>, right click to validate, generate, and deploy the table.
- 9 Navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Sequences>/<INTG_SEQ_ACC>, right click to validate, generate, and deploy.
 - 10 Navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Transformations>/<Functions>/<f(x) TRANS_ACCADDRTYPE, right click to validate, generate, and deploy.
 - 11 In Connection Explorer, navigate to <Files>/<INTG_IFLEX_ACCOUNT_FILE_LOC>, right click and open editor, make sure the IFLEX text data file is located in the path.
 - 12 Navigate to <Files>/<INTG_FILEX_DVM_FILE_LOC>, make sure the following files are located in the path:
 - APPLICANT_TYPE_MAP.csv
 - COUNTRY_MAP.csv
 - 13 For each of the following files in <INTG_IFLEX_SIEBEL_CONTACT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Mappings>/, repeat these steps:
 - a Navigate to the file.
 - b Right click to validate, generate, and deploy.
 - INTG_IFLEX_SIEBEL_ ACCOUNT
 - INTG_ACCOUNT_LOC_TO_RMT_2
 - INTG_ACCOUNT_LOC_TO_RMT
 - INTG_EIM_ASSET1_LOC_TO_RMT
 - IMPORT_APPLICANTTYPE_DVM
 - IMPORT_COUNTRY_DVM
 - 14 In Project Explorer, navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<Experts>/<INTG_IFLEX_SEBL_ACCOUNT>/<INTLOAD_FLOW>.
 - 15 Right click to validate, generate.
 - 16 Navigate to Design > Save All and then start the OWB Expert.

If there are no errors, a pop-up window displays the message: "PASS".

The EIM_FN_ASSET and EIM_FN_ASSET1 table and the mappings are now deployed.
 - 17 In the OWB main menu, navigate to <Tools>/<Control Center Manager>.

- 18 Open the Control Center Manager.
- 19 Navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<REP_USER_LOCATION>/<INTG_LOCAL_MODULE>/<Mappings>/<INTG_IFLEX_SIEBEL_ACCOUNT>, right click and start.
- 20 Wait for the job to complete successfully.
- 21 Use SQL Plus to connect to the local database.
- 22 Run these commands to verify the data are loaded to the table from the IFLEX data text file:
 - "select count(*) from EIM_FN_ASSET;"
 - "select count(*) from EIM_FN_ASSET1;"
 - "select count (*) from EIM_ASSET1

Each of the tables should have some rows present.

- 23 In Control Center Manager, navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<REP_USER_LOCATION>/<INTG_LOCAL_MODULE>/<Mappings>/<IMPORT_APPLICANTTYPE_DVM>, right click and start.
- 24 In Control Center Manager, navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<REP_USER_LOCATION>/<INTG_LOCAL_MODULE>/<Mappings>/<IMPORT_COUNTRY_DVM>, right click and start.
- 25 In Control Center Manger, navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<REP_USER_LOCATION>/<INTG_LOCAL_MODULE>/<Mappings>/<INTG_ACCOUNT_LOC_TO_RMT_2>, right click and start.
- 26 In Control Center Manger, navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<REP_USER_LOCATION>/<INTG_LOCAL_MODULE>/<Mappings>/<INTG_ACCOUNT_LOC_TO_RMT>, right click and start.

This loads EIM_FN_ASSET table in the remote database.

- 27 Start SQL Plus and connect to the remote database for Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products.
- 28 To verify the data are loaded to the tables, run these commands:
 - "select count (*) from EIM_FN_ASSET;"
 - "select count (*) from EIM_FN_ASSET1;"

Each of the tables should have some rows present.

The IFLEX data is loaded in Siebel EIM_FN_ASSET and EIM_FN_ASSET1 table in Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products.

To create account cross-references in Siebel EIM

- 1 Start the Oracle database on a local machine.
- 2 Make sure the remote Oracle database for Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products is running.
- 3 Log in to Oracle Warehouse Builder.

- 4 Navigate to Design > Import.
- 5 Import the Account project file:
INTG_IFLEX_SIEBEL_ACCOUNT_XREF.mdl
- 6 Start SQL Plus
- 7 Connect to the local Oracle database.
- 8 Run this command to check if XREF_DATA exists:
"desc XREF_DATA"
- 9 If the data does not exist, follow these steps:
 - a In OWB and Project Explorer, navigate to <INTG_IFLEX_SIEBEL_ACCOUNT_XREF>/<Databases>/<Oracle>/<SEBL_LOCAL_MODULE>/<Tables>/<XREF_DATA>.
 - b Right click to validate, generate, and deploy the table.
 - c In OWB and Project Explorer, navigate to <INTG_IFLEX_SIEBEL_ACCOUNT_XREF>/<Databases>/<Oracle>/<SEBL_LOCAL_MODULE>/<Tables>/<XREF_DATA_FLAT>.
 - d Right click to validate, generate, and deploy the table.
- 10 Navigate to <INTG_IFLEX_SIEBEL_ACCOUNT_XREF>/<Databases>/<Oracle>/<SEBL_LOCAL_MODULE>/<Sequences>/<COM_ID_SEQ>, right click to validate, generate, and deploy.
- 11 Navigate to <INTG_IFLEX_SIEBEL_ACCOUNT>/<Databases>/<Oracle>/<INTG_LOCAL_MODULE>/<Transformations>/<Functions>/<f(x)> TRANS_CONCAT_COMMONID, right click to validate, generate, and deploy.
- 12 In Project Explorer, navigate to <INTG_IFLEX_SIEBEL_ACCOUNT_XREF>/<Experts>/<INTG_IFLEX_SEBL_ACCOUNT_XREF>/<INTLOAD_FLOW>, right click to validate, generate.
- 13 Navigate to Design > Save All and then start the OWB Expert.
If there are no errors, a pop-up window displays the message: "PASS".
The XREF_DATA table and mapping object are now deployed.
- 14 In the OWB main menu, navigate to <Tools>/<Control Center Manager>.
- 15 Open the Control Center Manager.
- 16 Navigate to <INTG_IFLEX_SIEBEL_ACCOUNT_XREF>/<REP_USER_LOCATION>/<SEBL_ACCOUNT_XREF>/<Mappings>/<ACCOUNT_XREF>, right click and start.
- 17 Wait for the job to complete successfully.
- 18 Using SQL Plus, connect to the local database and run this command:
"select count(*) from xref_data"
The table should have some rows present.

To load account data from Siebel EIM into the Siebel database

- 1 Open a DOS command window.
- 2 Get the IF_ROW_BATCH_NUM from OWB.
- 3 Change directory to siebsrvr\bin.
- 4 Log in to odbcsql.
- 5 Run the following select statements to populate the EIM_FN_ASSET, EIM_FN_ASSET1, and EIM_ASSET1 tables:
 - SELECT * FROM XXXX.EIM_FN_ASSET T1 WHERE T1.IF_ROW_BATCH_NUM = <FROM OWB>SQL should return records that have been inserted by the OWB script.
- 6 From a DOS command lines start the server manager using this command.
 - Srvrmgr /e <enterprise> /g <gateway name> /s <siebsrvr name> /u SADMIN /p <password>
- 7 In srvrmgr, enable the component group EAI, if it is not already enabled and restart siebsrvr.
 - for example: srvrmgr> enable compgrp eai
 - restart siebsrvr
- 8 Run the following commands to set log file options:
 - change params traceflags=1, errorflags=1, sqlflags=8 for comp eim
 - CHANGE EVTLOGlvl EIMTRACE=3 FOR COMP EIM
 - CHANGE EVTLOGlvl EIMSQL=4 FOR COMP EIM

NOTE: The following command requires the Notepad application. Do not use WordPad as it causes problems with text formatting.

- 9 Open Notepad.
- 10 Enter following lines into Notepad and save file as siebsrvr\admin\iflex_asset_load.ifb.

```
[Siebel Interface Manager]
  PROCESS = Import Financial Accounts

[Import Financial Accounts]
  TYPE = IMPORT
  BATCH = 1100
  TABLE = EIM_FN_ASSET
  ONLY BASE TABLES = S_ASSET
  ONLY BASE TABLES = S_ASSET, S_ASSET_BU, S_ASSET_POSTN
  FIXED COLUMN = BILLAC_BACCT_NUM, "1"
  FIXED COLUMN = BILLAC_BACCTYPE_CD, "12"
  FIXED COLUMN = AST_AUTO_SR_FLG, "N"
  FIXED COLUMN = AST_COMPUNDWRNTYFL, "N"
  FIXED COLUMN = AST_CUSTOMIZABLEFL, "N"
  FIXED COLUMN = AST_DMNDNG_DR_FLG, "N"
  FIXED COLUMN = AST_FLEET_FLG, "N"
  FIXED COLUMN = AST_PRODUNDWRNTYFL, "N"
  FIXED COLUMN = AST_REFERENCEABLEFL, "N"
```

```

FIXED COLUMN = AST_SRLNUMVRFD_FLG, "N"
FIXED COLUMN = AST_UNDMFGWRNTYFLG, "N"
FIXED COLUMN = AST_TYPE_CD, "Fin Account"
FIXED COLUMN = PSTN_NAME, "Siebel Administrator"
FIXED COLUMN = PSTN_OU_BU, "Default Organization"
FIXED COLUMN = PSTN_OU_LOC, "INTERNAL"
FIXED COLUMN = PSTN_OU_NAME, "Siebel Administration"

```

- 11** Enter following lines into Notepad and save the file as siebsrvr\admin\iflex_asset1_load.ifb.

```

[Siebel Interface Manager]
  PROCESS = Import Financial Accounts

[Import Financial Accounts]
  TYPE = IMPORT
  BATCH = 1100
  TABLE = EIM_FN_ASSET1
  ONLY BASE TABLES = S_ASSET, S_ADDR_PER, S_ASSET_CON
  FIXED COLUMN = ADDR_CON_PRIV_FLG, "N"
  FIXED COLUMN = ADDR_DISACLEANSEFL, "N"
  FIXED COLUMN = ADDR_NAME_LOCK_FLG, "N"
  FIXED COLUMN = ADDR_PREMISE_FLG, "N"
  FIXED COLUMN = CON_CON_BU, "Default Organization"

```

- 12** Enter following lines into Notepad and save the file as siebsrvr\admin\iflex_eim_asset1_load.ifb.

```

[Siebel Interface Manager]
  PROCESS = Import Financial Accounts

[Import Financial Accounts]
  TYPE = IMPORT
  BATCH = 1100
  TABLE = EIM_ASSET1
  ONLY BASE TABLES = S_ASSET, S_ASSET_ADDR

```

- 13** Log in to server manager.

- 14** Run EIM import using the following commands.

- Start task for comp eim with config=iflex_asset_load.ifb
- Start task for comp eim with config=iflex_asset1_load.ifb
- Start task for comp eim with config=iflex_eim_asset_load.ifb

- 15** When the import is complete, check the EIM log file from siebsrvr\log to make sure records have been imported into the appropriate Siebel base tables such as S_ASSET, S_ADDR_PER, S_ASSET_CON, and so on.

- 16** To display the imported records, run the following command:

```

Select IF_ROW_STAT from EIM_FN_ASSET where IF_ROW_BATCH_NUM=<FROM OWB>;

```

IF_ROW_STAT should have the value IMPORTED for all imported records.

5

Integrations

This chapter contains information on the following integrations:

- [Assumptions and Limitations on page 69](#)
- [Data Integrations on page 70](#)
- [Integration Points on page 72](#)
- [Changes to Siebel CRM User Interface on page 85](#)

Assumptions and Limitations

The following are assumptions and limitations necessary to create a practical integration:

- Siebel CRM is the master for Contact data.
- i-flex is the master for Financial Account and Product data.
- Processes are implemented as synchronous calls.
- Financial Origination supports two types of accounts: Current Accounts and Term Deposits.
- Merge logic is not supported.
- Bank branch information is stored in Siebel CRM as an internal division and the Common ID association between the Siebel's ROW IDs and i-flex's Branch code is updated manually in the Common Services XREF layer.
- Some fields have different names and lengths. [Table 2](#) lists these differences.

Table 2. Field Name and Length Differences

Siebel CRM		Canonical Object		i-flex FLEXCUBE	
Field Name	Length	Field Name	Length	Field Name	Length
Addrline1	100	addressLine1	250	Line1	35
Addrline2	100	addressLine2	250	Line2	35
City and Country	50	City	250	Line3	35
State	20	State	250	Line4	35
zip	30				

Data Integrations

Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products integrates the following types of data:

- [Contact \(Customer\) Data Integration on page 70](#)
- [Financial Account Data Integration on page 71](#)
- [Product Data Integration on page 71](#)

All data must be loaded in both applications before use. For more information, read [Chapter 4, “Data Loading.”](#) As you use Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products, this data is synchronized in real time between i-flex FLEXCUBE and Siebel CRM.

Contact (Customer) Data Integration

Siebel CRM is the master source of customer data. i-flex FLEXCUBE must be kept in synchronization with Siebel CRM. [Figure 3](#) illustrates the synchronization of customer data.

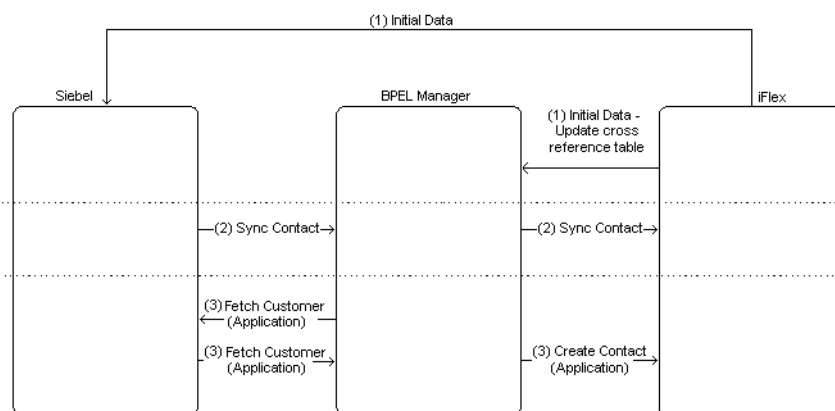


Figure 3. Customer Data Flow

NOTE: When creating a new customer account, make sure the Branch field contains a valid entry.

The following integration points use customer data:

- [Customer Account Address Change on page 72](#)
- [Request Summary of Customer's Financial Accounts on page 76](#)
- [Synchronize Financial Account on page 80](#)

Financial Account Data Integration

i-flex FLEXCUBE is the master source of financial account data. Siebel CRM must be kept in synchronization with i-flex FLEXCUBE. Figure 4 illustrates the synchronization of financial account data.



Figure 4. Financial Account Data Flow

The following integration points use financial account data:

- [Request Financial Account Statement Service Request on page 75](#)
- [Request Financial Account Transactions on page 75](#)
- [Request Summary of Customer's Financial Accounts on page 76](#)
- [Modification of Rollover Details of a Term Deposit on page 74](#)
- [Submit Financial Account Application on page 77](#)
- [Synchronize Financial Account on page 80](#)

Product Data Integration

i-flex FLEXCUBE is the master source of product data. Siebel CRM must be kept in synchronization with i-flex FLEXCUBE. Figure 5 illustrates the synchronization of product data.



Figure 5. Product Data Flow

The following integration point uses product data:

- [Synchronize Product on page 83](#)

Integration Points

The Siebel CRM Integration Pack for i-flex FLEXCUBE Account Originations - Liability Products consists of the following integration points between the two applications:

- [Customer Account Address Change on page 72](#)
- [Fetch Customer on page 73](#)
- [Modification of Rollover Details of a Term Deposit on page 74](#)
- [Request Financial Account Statement Service Request on page 75](#)
- [Request Financial Account Transactions on page 75](#)
- [Request Summary of Customer's Financial Accounts on page 76](#)
- [Submit Financial Account Application on page 77](#)
- [Synchronize Customer on page 80](#)
- [Synchronize Financial Account on page 80](#)
- [Synchronize Product on page 83](#)

Customer Account Address Change

Direction: Siebel CRM to i-flex FLEXCUBE

Data synchronized: Customer

Description: This service requests modification of an account address. This can be done for the following types of accounts:

- Current (checking) account
- Savings deposit account
- Term deposit account

BPEL Process Name: CRMIntegSubmitServiceRequestSEBL782ToIFLEXSync

Figure 6 shows the BPEL process for this integration point.

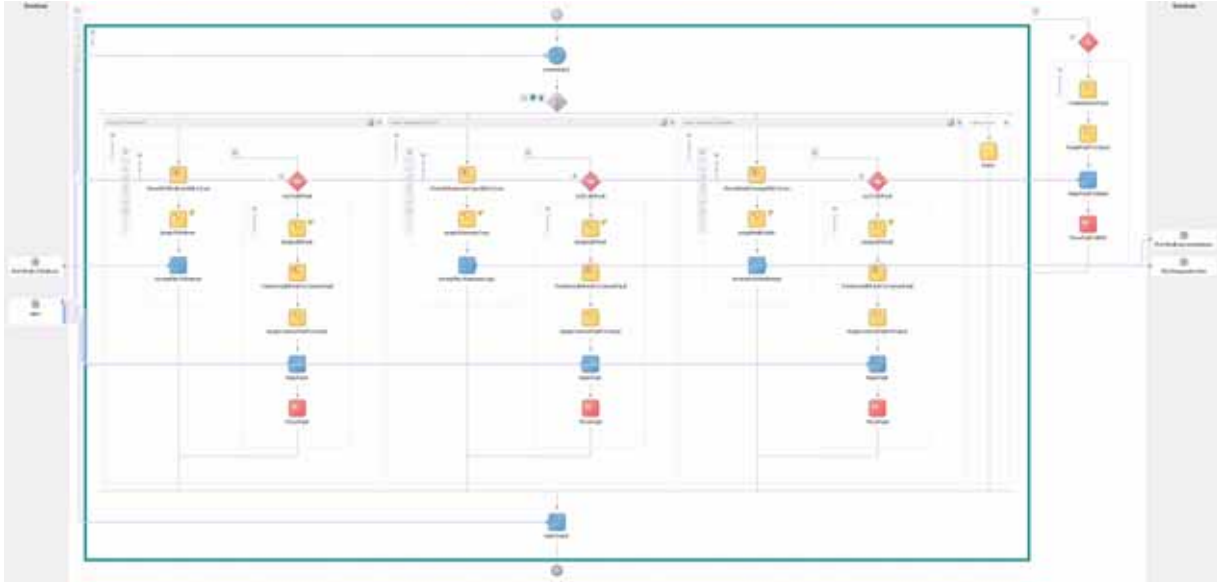


Figure 6. The CRMIntegSubmitServiceRequestSEBL782ToIFLEXSync BPEL Process

Fetch Customer

Direction: i-flex FLEXCUBE to Siebel CRM

Data synchronized: Customer

Description: This process flow is called as part of the Account Origination flow. This process gets the Customer Information from Siebel CRM, given the Customer Id. This process is called by the iFLEX UBS Account Origination process, if it does not have the Customer Record in their database.

BPEL Process Name: CRMIntegFetchCustomerIFLEXUBS72ToSEBL782Sync

Figure 7 shows the BPEL process for this integration point.

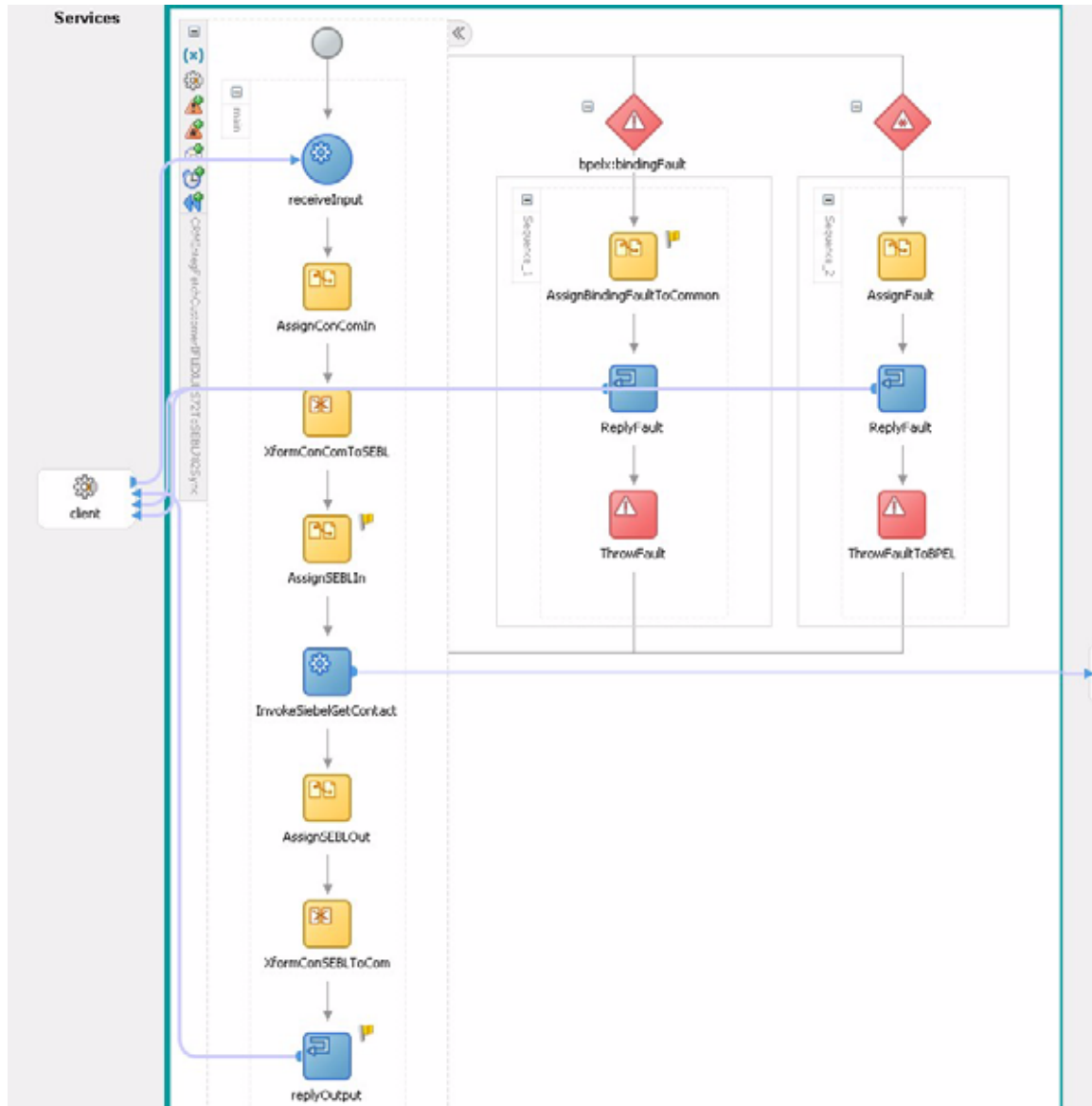


Figure 7. The CRMIntegFetchCustomerIFLEXUBS72ToSEBL782Sync BPEL Process

Modification of Rollover Details of a Term Deposit

Direction: Siebel CRM to i-flex FLEXCUBE

Data synchronized: Financial Account

Description: This service is used for modification of the rollover instructions of a Term Deposit. The rollover type can be modified to "Principal + Interest" only.

BPEL Process Name: CRMIntegSubmitServiceRequestSEBL782ToIFLEXSync

[Figure 6 on page 73](#) shows the BPEL process for this integration point.

Request Financial Account Statement Service Request

Direction: Siebel CRM to i-flex FLEXCUBE

Data synchronized: Financial Account

Description: This service requests an account statement. The statement is generated for the account between any two specified dates. If the dates are not specified, they both default to the current date. The request can be used for the following types of accounts:

- Current (checking) account
- Savings deposit account
- Term deposit account

BPEL Process Name: CRMIntegSubmitServiceRequestSEBL782ToIFLEXSync

[Figure 6 on page 73](#) shows the BPEL process for this integration point.

Request Financial Account Transactions

Direction: Siebel CRM to i-flex FLEXCUBE

Data synchronized: Financial Account

Description: This service retrieves transactions (accounting entry details) for a specified account between any two specified dates. If the dates are not specified, they both default to the current date. The transaction details can be retrieved for the following types of accounts:

- Current (checking) account
- Savings deposit account
- Term deposit account
- Consumer Loans

BPEL Process Name: CRMIntegRequestTransactionSEBL782ToIFLEXSync

Figure 8 shows the BPEL process for this integration point.

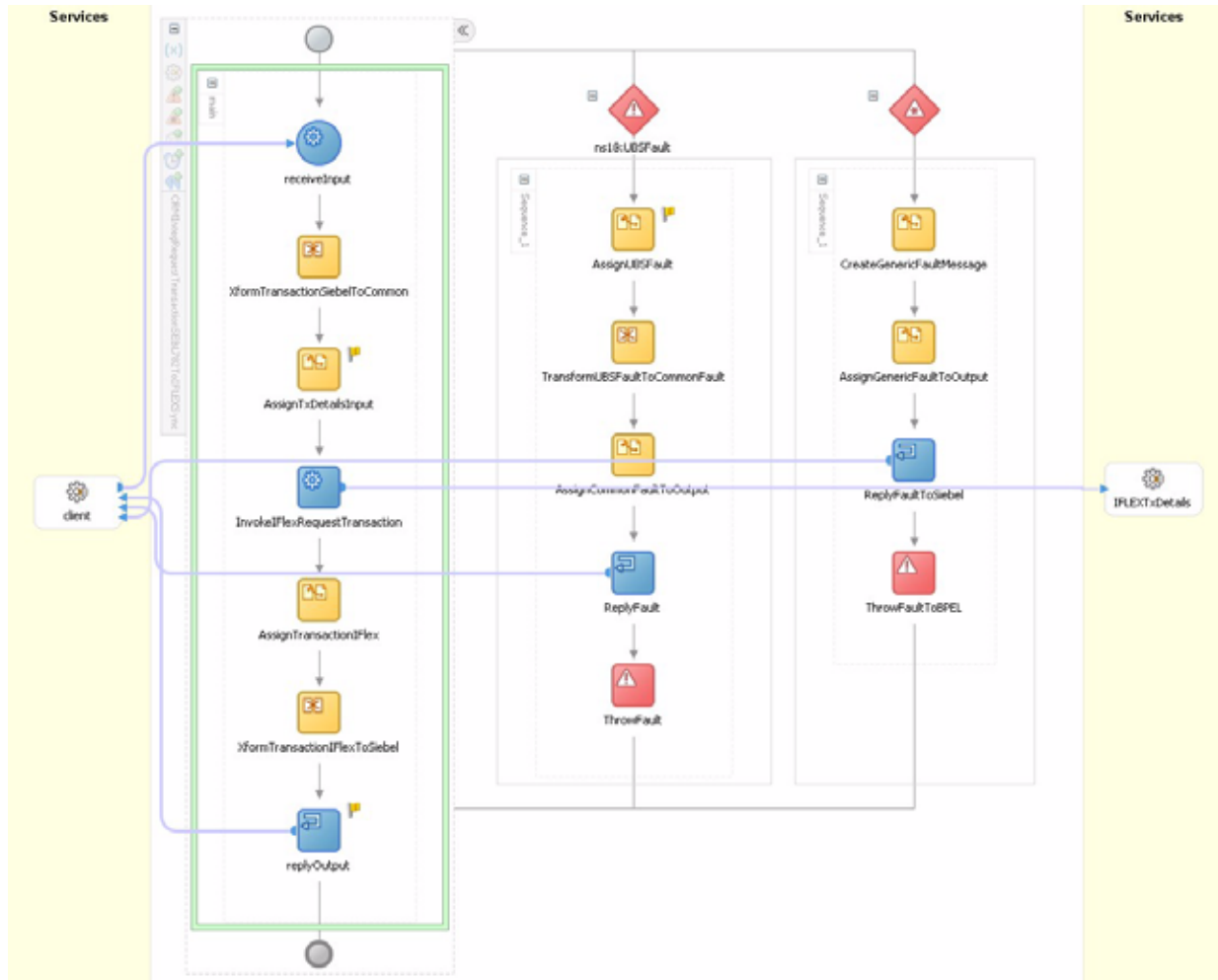


Figure 8. The CRMIntegRequestTransactionSEBL782ToIFLEXSync BPEL Process

Request Summary of Customer's Financial Accounts

Direction: i-flex FLEXCUBE to Siebel CRM

Data synchronized: Customer, Financial Account

Description: This service retrieves the summary details for all the accounts associated with a customer. The following are the account types that are retrieved for the customer:

- Current (checking) account
- Savings deposit account
- Term deposit account

■ Consumer Loans

Available on the Contact Summary view in Siebel CRM, this integration point can display up to date list of financial accounts associated to the customer.

BPEL Process Name: CRMIntegRequestAccountSummarySEBL782ToFLEXUBS72Sync

Figure 9 shows the BPEL process for this integration point.

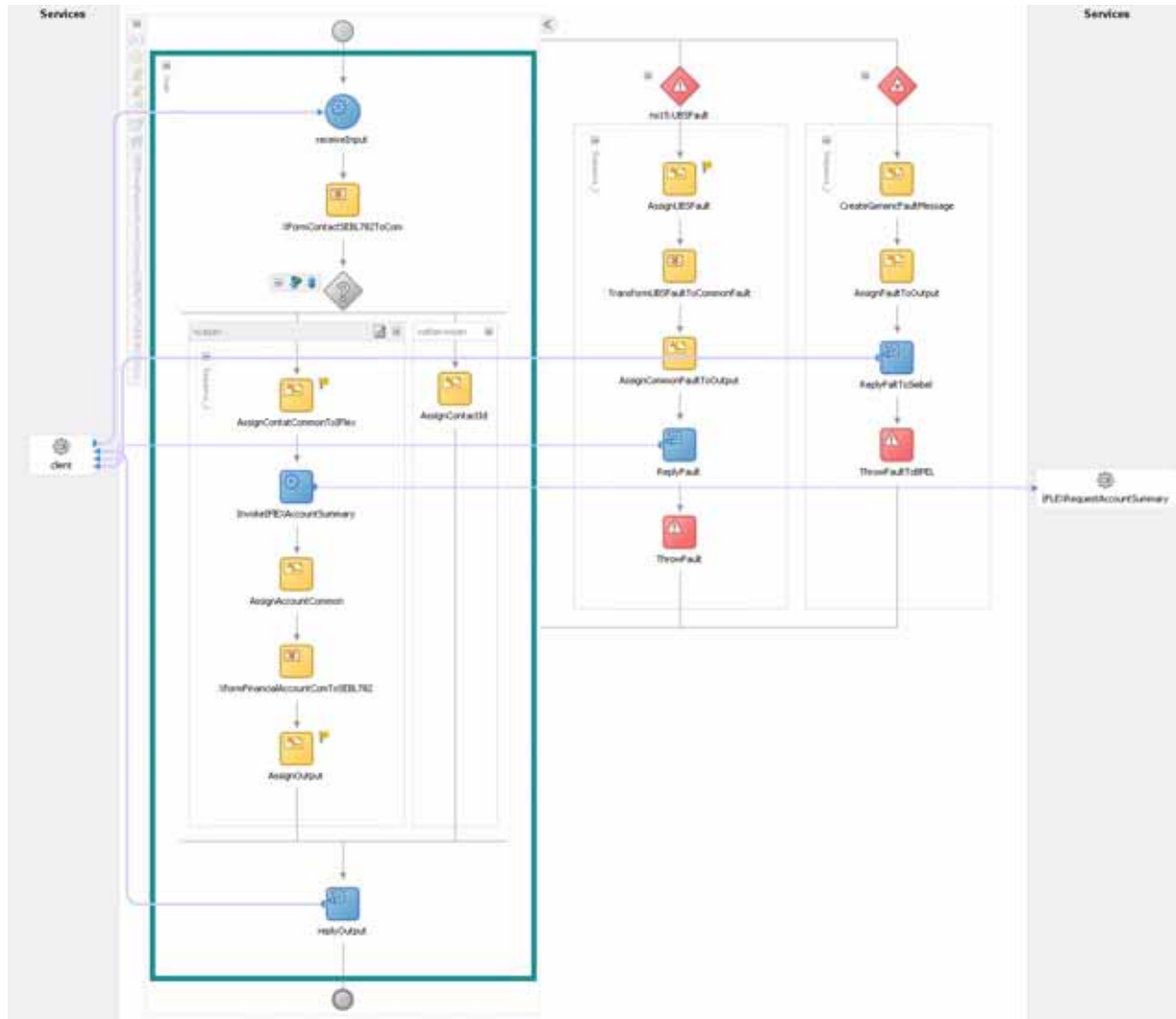


Figure 9. The CRMIntegRequestAccountSummarySEBL782ToFLEXUBS72Sync BPEL Process

Submit Financial Account Application

Direction: Siebel CRM to i-flex FLEXCUBE

Data synchronized: Financial Account

Description: This service is used for creating a new account in FLEXCUBE.

This service also handles the customer creation process. If the underlying customer of the account does not exist, then the process obtains the customer details from Siebel CRM and creates it in FLEXCUBE. When the customer record is successfully created, the account creation proceeds.

The following are the account types that can be created in FLEXCUBE:

- Current (checking) account
- Savings deposit account
- Term deposit account

BPEL Process Name: CRMIntegAccountOriginationSEBL82ToIFLEXUBS72Sync

Figure 10 shows the BPEL process for this integration point.

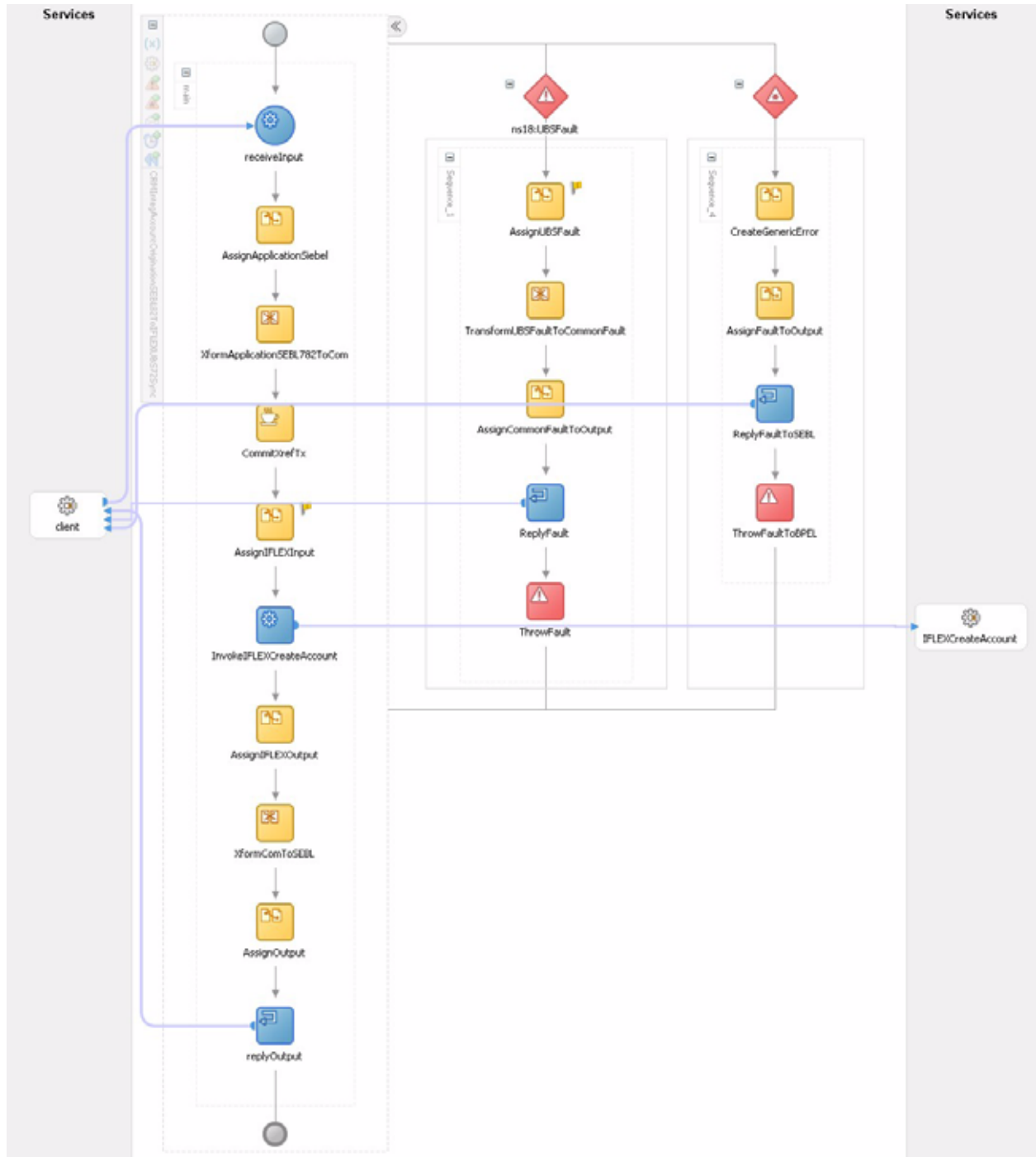


Figure 10. The CRMIntegAccountOriginationSEBL82ToFLEXUBS72Sync BPEL Process

Synchronize Customer

Direction: Siebel CRM to i-flex FLEXCUBE

Data synchronized: Customer

Description: This operation synchronizes the contact information in Siebel CRM with i-flex FLEXCUBE UBS.

BPEL Process Name: CRMIntegUpdateCustomerSEBL782ToIFELXSync

Figure 11 shows the BPEL process for this integration point.

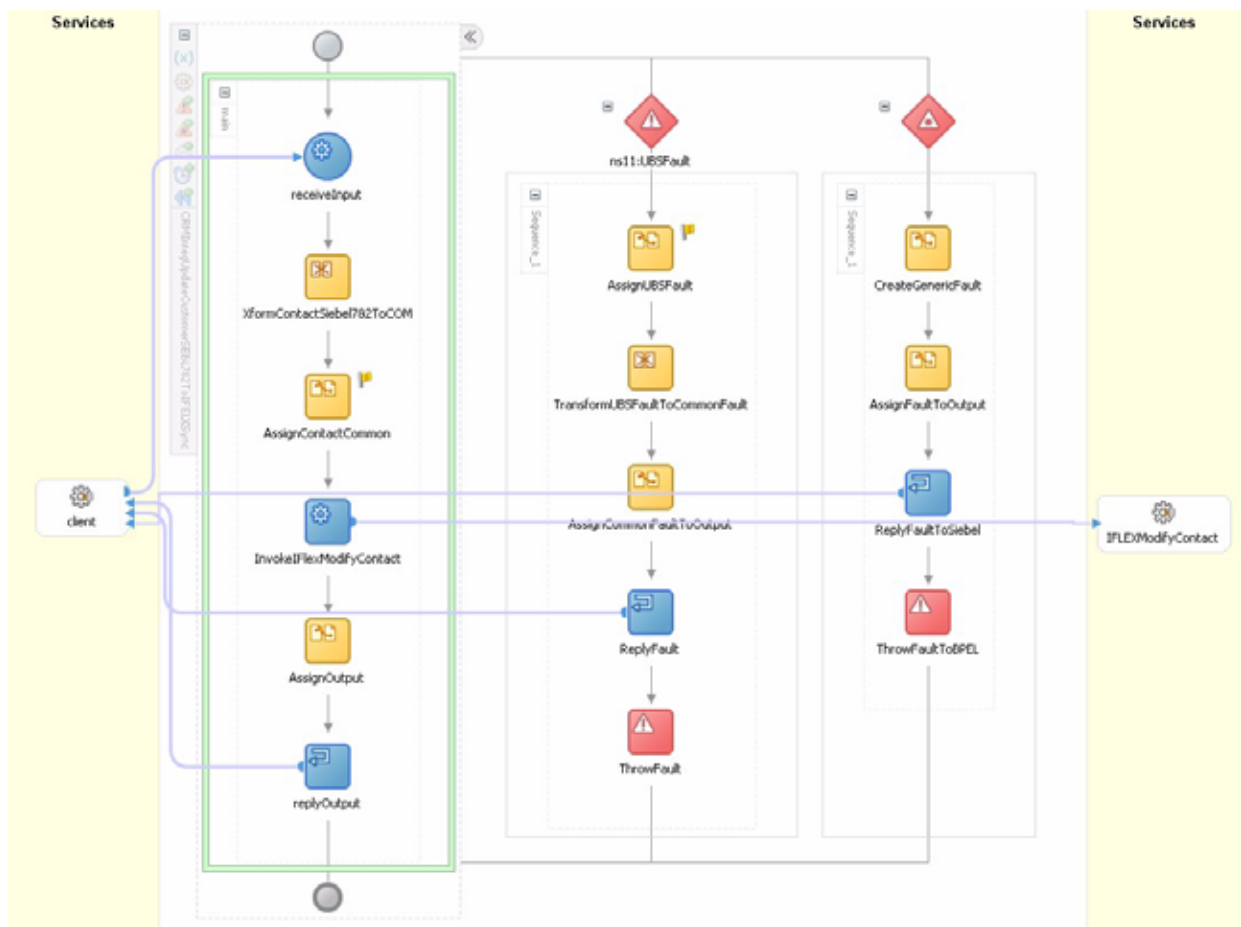


Figure 11. The CRMIntegUpdateCustomerSEBL782ToIFELXSync BPEL Process

Synchronize Financial Account

Direction: i-flex FLEXCUBE to Siebel CRM

Data synchronized: Financial Account

Description: i-flex FLEXCUBE is the master repository for financial accounts. If a change occurs on an account and is authorized, the details of the account are sent to Siebel CRM. This process is initiated by i-flex FLEXCUBE to synchronize the account details with Siebel CRM. The following are the account types that are synchronized:

- Current (checking) account
- Savings deposit account
- Term deposit account
- Consumer Loans

BPEL Process Name: CRMIntegSynchronizeFinancialAccountIFLEXUSBS72ToSEBL782Sync

Figure 12 shows the BPEL process for this integration point.

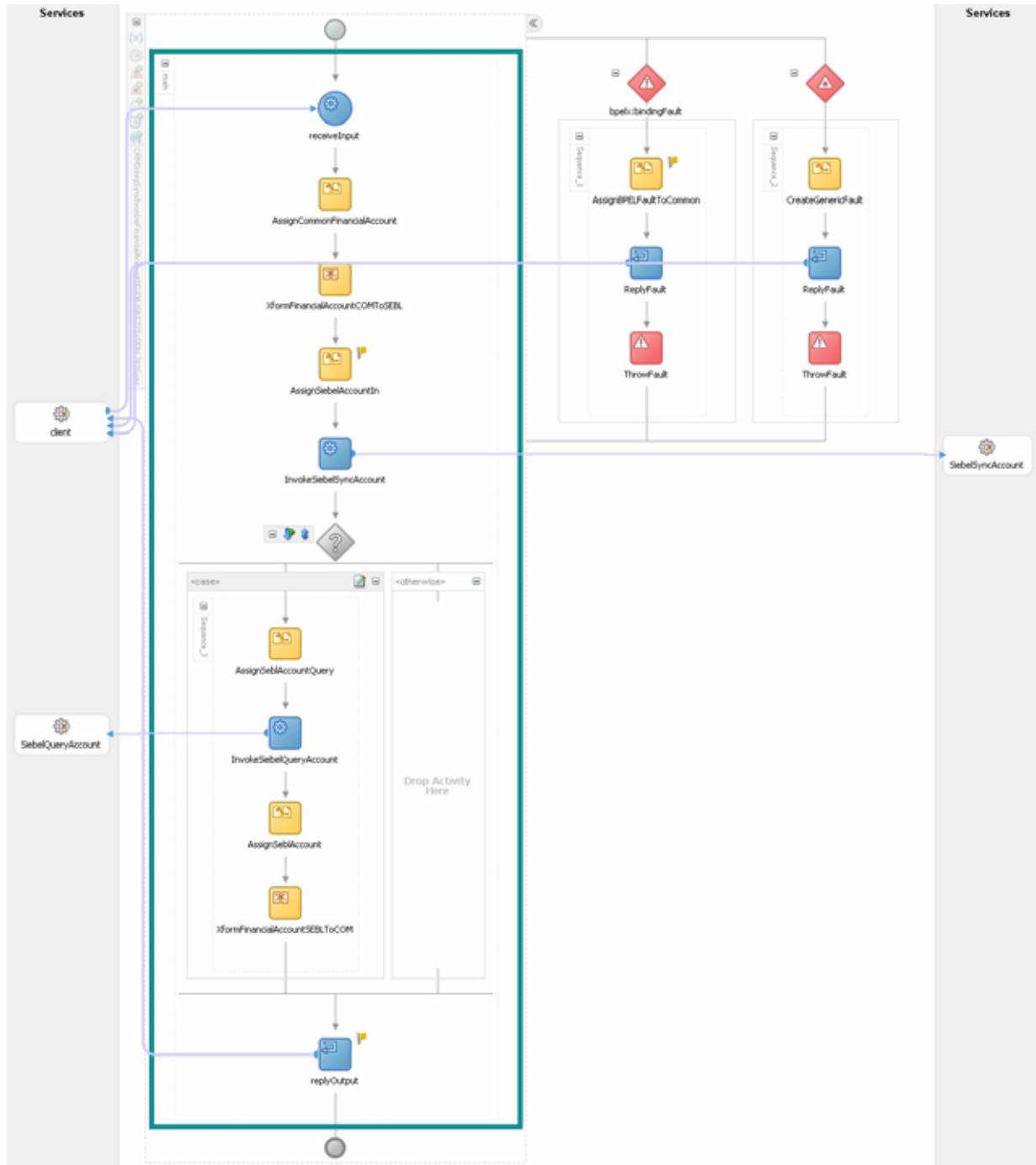


Figure 12. The CRMIntegSynchronizeFinancialAccountIFLEXUSBS72ToSEBL782Sync BPEL Process

Synchronize Product

Direction: i-flex FLEXCUBE to Siebel CRM

Data synchronized: Product

Description: i-flex FLEXCUBE is the master repository for Products. If a change occurs on the product and is authorized then the details of the account are sent to Siebel CRM. This process is initiated by i-flex FLEXCUBE. The following are the product types that are synchronized:

- Consumer Loan product
- Current (checking) account
- Savings deposit account
- Term Deposit product

BPEL Process Name: CRMIntegSynchronizeProductIFLEXTToSEBL782Sync

Figure 13 shows the BPEL process for this integration point.

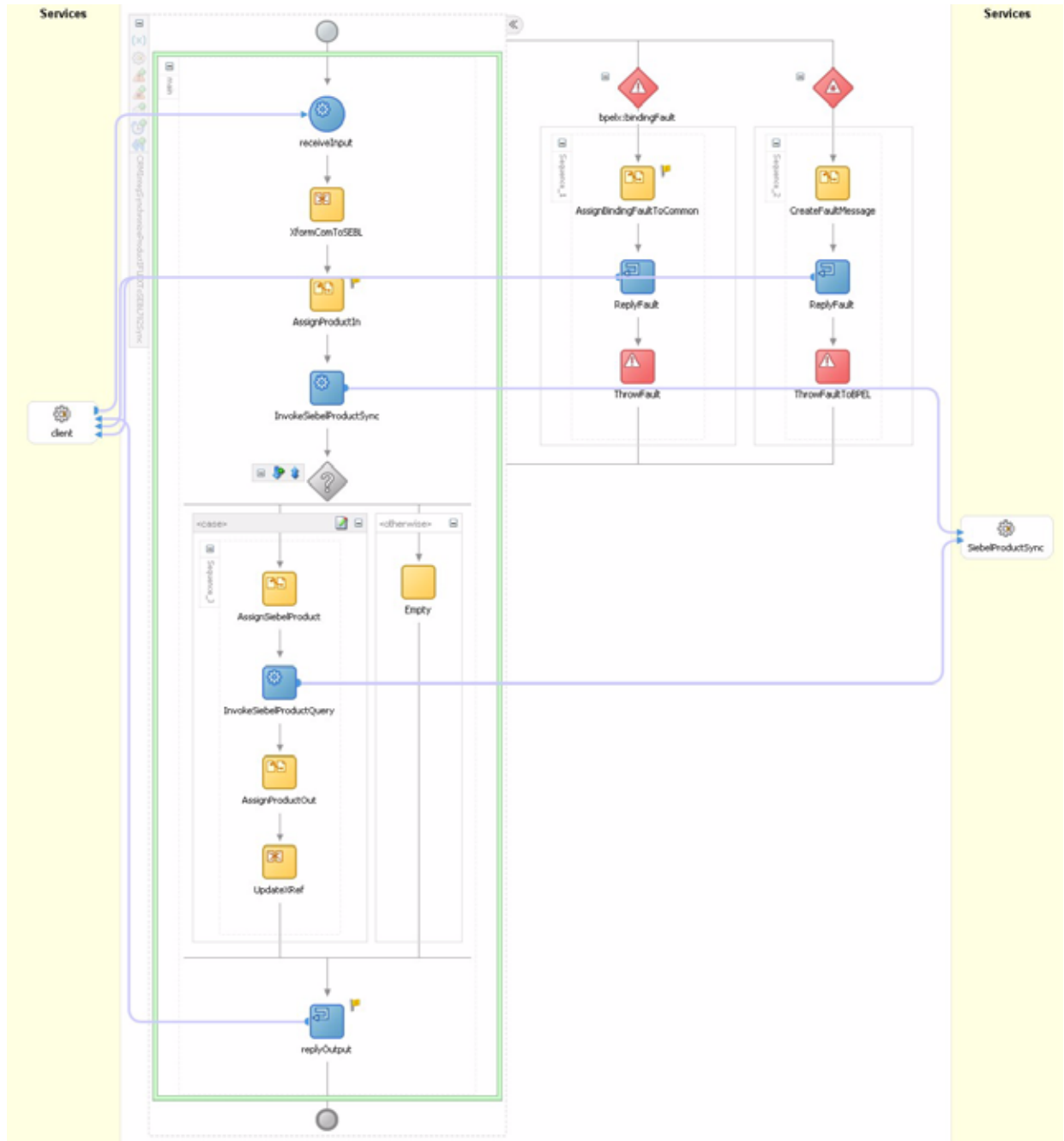


Figure 13. The CRMIntegSynchronizeProductIFLEXTToSEBL782Sync BPEL Process

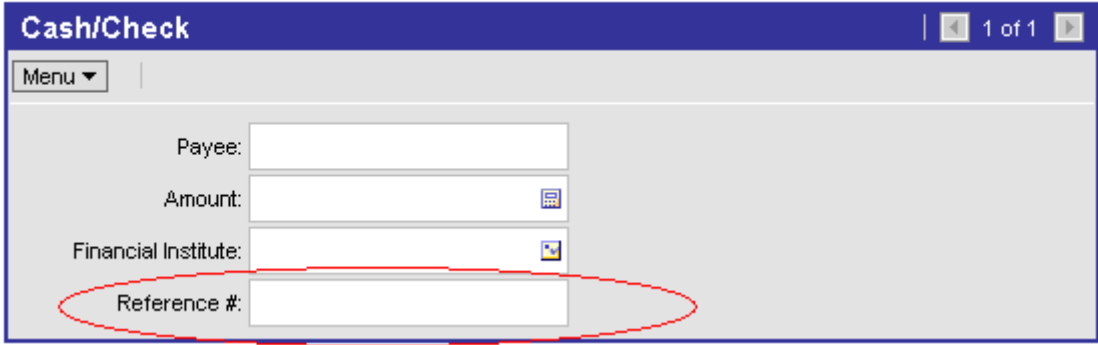
Changes to Siebel CRM User Interface

The following changes have been made to the Siebel CRM user interface to work with the integration points:

- [Account Funding Check/Cash Form Applet on page 85](#)
- [Contact List Applet on page 86](#)
- [Financial Account Address Pick Applet on page 86](#)
- [FINCORP Account Transaction View on page 87](#)
- [FINS Product Details SF View-Rates CRMInteg View on page 87](#)
- [Routing # View on page 88](#)
- [Statement Copy View on page 89](#)
- [Term Deposit Rollover View on page 89](#)

Account Funding Check/Cash Form Applet

Change: Added a field for Reference Number on the Account Funding Check/Cash Form Applet, as shown in [Figure 14](#).

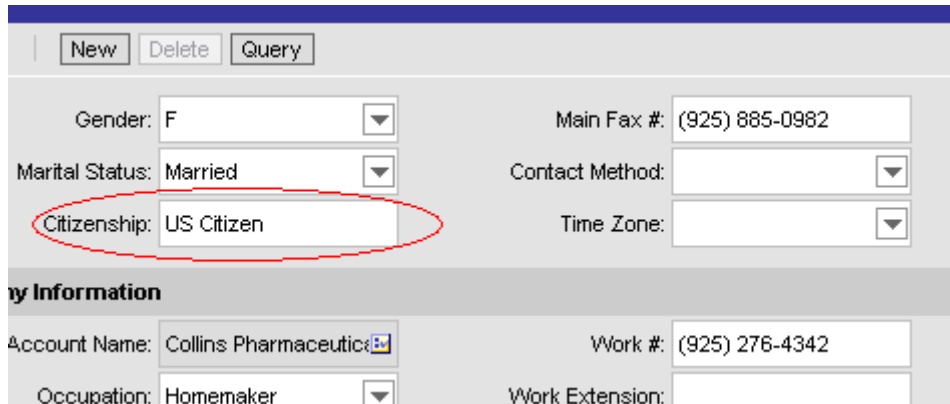


The screenshot shows the 'Cash/Check' applet interface. It features a 'Menu' dropdown at the top left and a '1 of 1' indicator at the top right. The main area contains four input fields: 'Payee:', 'Amount:', 'Financial Institute:', and 'Reference #:'. The 'Reference #' field is circled in red, indicating its addition. The 'Amount' and 'Financial Institute' fields have small icons to their right.

Figure 14. Reference Number Field on the Account Funding Check/Cash Form Applet

Contact List Applet

Change: Added a field for Citizenship on the Contact List Applet, as shown in [Figure 15](#).

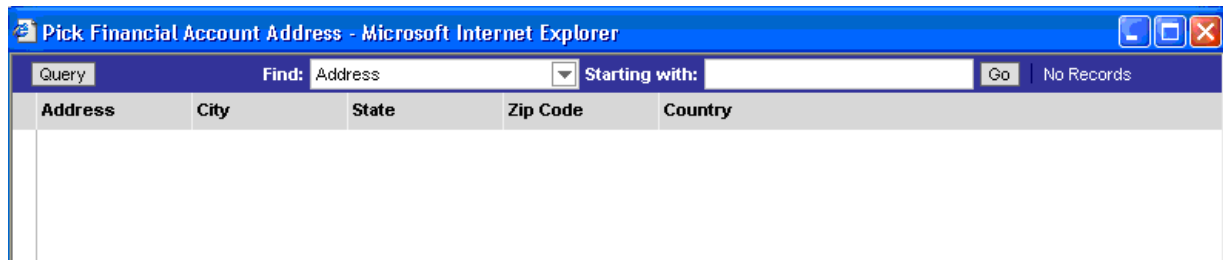


The screenshot shows a web form for a contact record. At the top, there are buttons for 'New', 'Delete', and 'Query'. Below these are several input fields: 'Gender' (dropdown menu with 'F' selected), 'Main Fax #' (text box with '(925) 885-0982'), 'Marital Status' (dropdown menu with 'Married' selected), 'Contact Method' (dropdown menu), 'Citizenship' (text box with 'US Citizen' selected, circled in red), and 'Time Zone' (dropdown menu). A section titled 'Company Information' contains 'Account Name' (text box with 'Collins Pharmaceutical'), 'Work #' (text box with '(925) 276-4342'), 'Occupation' (dropdown menu with 'Homemaker' selected), and 'Work Extension' (text box).

Figure 15. Citizenship Field on the Contact List Applet

Financial Account Address Pick Applet

Change: When calling the Financial Account Address Pick applet from the Service Request Account Address Change View, draw addresses from the Old Address column, as shown in [Financial Account Address Pick Applet on page 86](#).



The screenshot shows a web browser window titled 'Pick Financial Account Address - Microsoft Internet Explorer'. The interface includes a search bar with 'Find: Address' and a 'Starting with:' field. A 'Go' button and 'No Records' text are visible. Below the search bar is a table with the following headers: 'Address', 'City', 'State', 'Zip Code', and 'Country'. The table body is currently empty.

Figure 16. Financial Account Address Pick Applet

FINCORP Account Transaction View

Change: In FINCORP Account, added a new view for Transaction, as shown in [Figure 17](#).

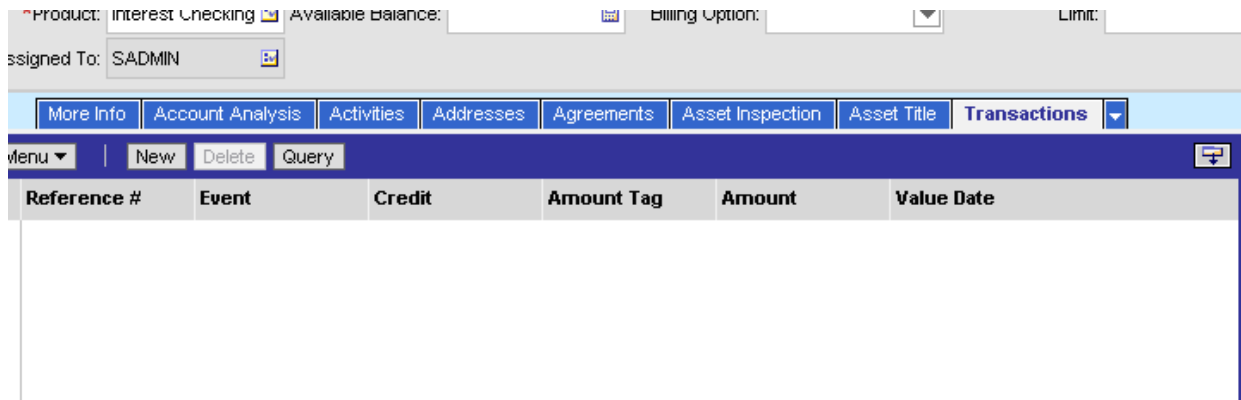


Figure 17. Transaction View

FINS Product Details SF View-Rates CRMInteg View

Change: Added a new view, as shown in [Figure 18](#).

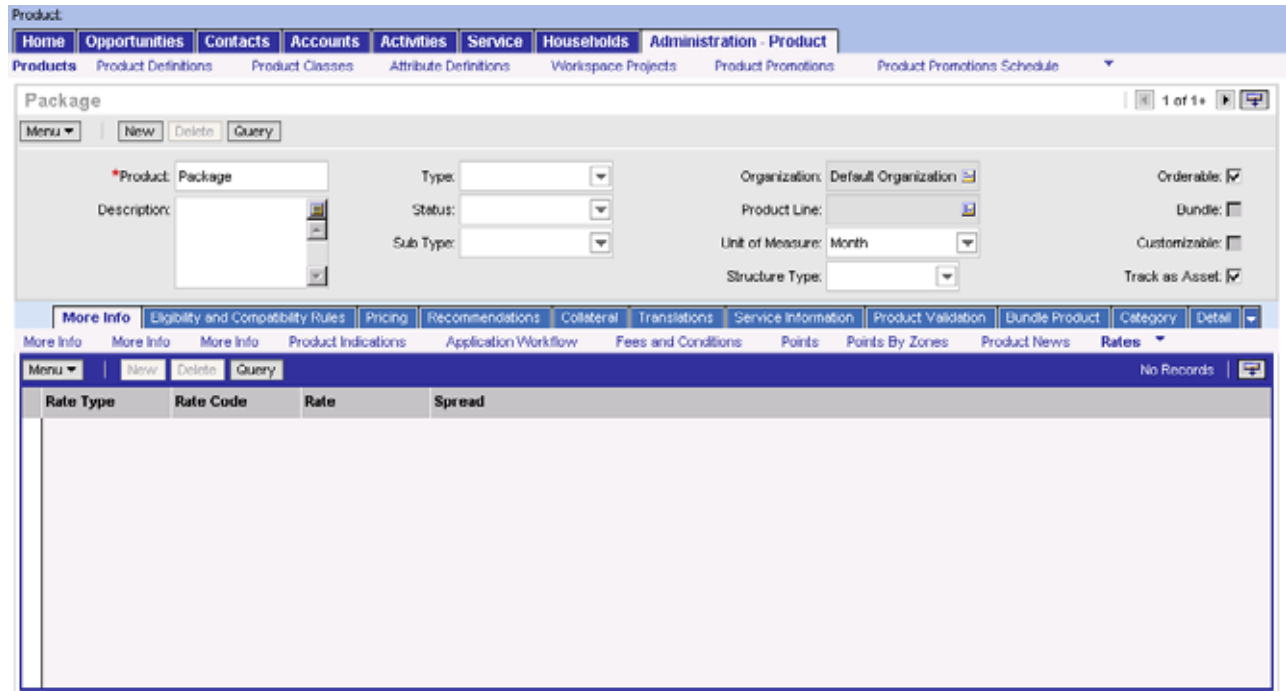


Figure 18. Product Details SF View-Rates CRMInteg View

Routing # View

Change: Added the ABA# field to the Internal Division List and Internal Division Form applets, as shown in Figure 19.

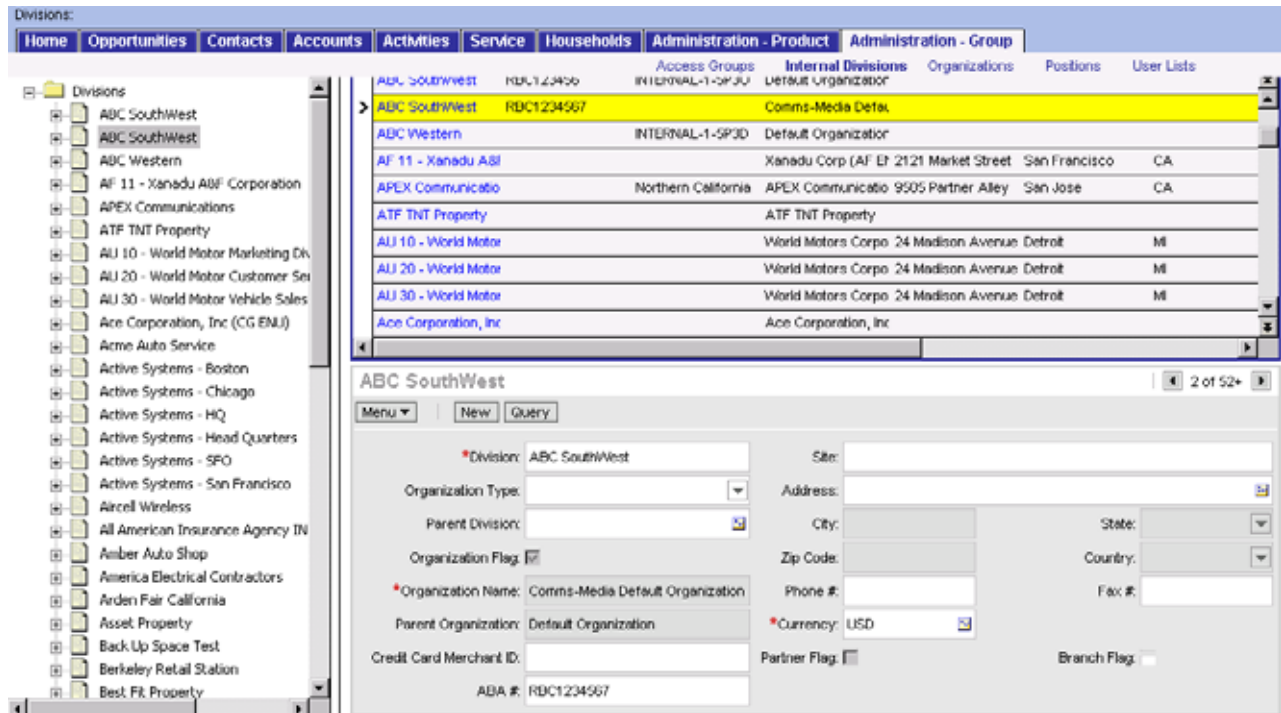


Figure 19. Routing # View

Statement Copy View

Change: On the Statement Copy view, removed the Month and Year fields and replaced them with From Date and To Date, as shown in [Figure 20](#).

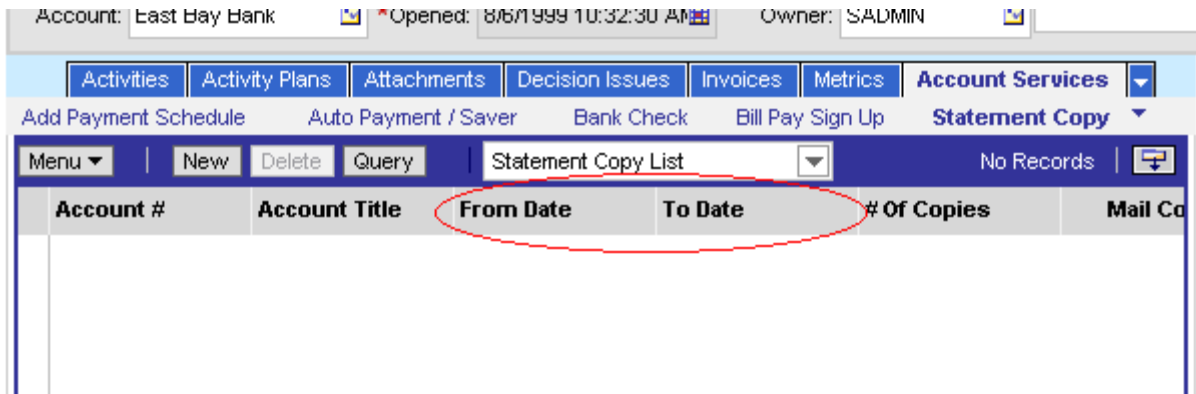


Figure 20. Statement Copy View

Term Deposit Rollover View

Change: Added a new view, Term Deposit Roller, as shown in [Figure 21](#).

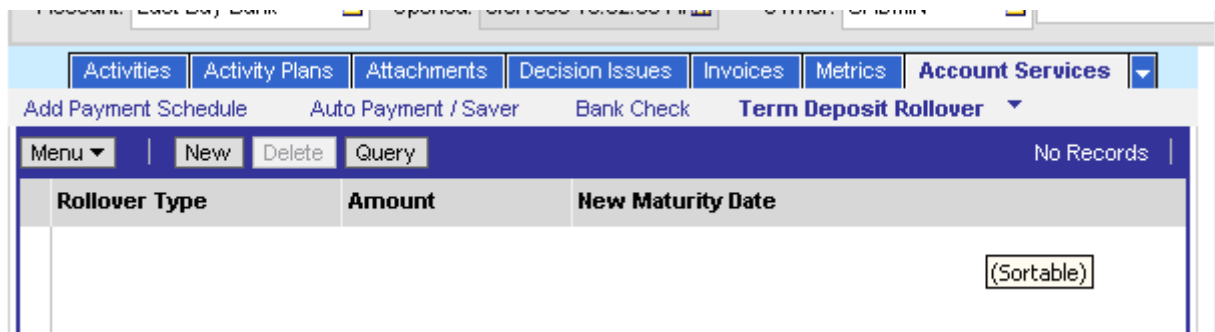


Figure 21. Term Deposit Rollover View

6 Troubleshooting

This chapter contains the following information:

- [Siebel Error Logs on page 91](#)
- [Error Messages on page 92](#)
- [Troubleshooting Techniques on page 115](#)

Siebel Error Logs

Within the Siebel environment logging information is written to logs files to help facilitate troubleshooting unwanted behaviors. The following log types are available:

- [Siebel Server Log Files on page 91](#)
- [Siebel Web Server Extension Log Files on page 91](#)
- [Siebel Dedicated Web Client Log Files on page 92](#)
- [Siebel Events and Event Logging on page 92](#)

Siebel Server Log Files

For an enterprise Siebel Server environment the log files are stored in the log directory for each individual Siebel Server. The *System Monitoring and Diagnostics Guide for Siebel Business Applications* provides details about these log files. The log file is located as follows:

- For Microsoft Windows:
\$SIEBSRVR_ROOT\log directory
- For UNIX:
\$SIEBSRVR_ROOT/enterprises/\$Enterprise/\$Siebel_Server/log directory.

Siebel Web Server Extension Log Files

The Siebel Web Server Extension or SWSE Log Files are maintained in the log directory of the Siebel Web Server Extension root installation. For details information about SWSE logging, refer to Siebel FAQ 2117. The log file is located as follows:

- For Microsoft Windows:
\$SWEAPP_ROOT\log
- For UNIX:

\$SWEAPP_ROOT/!og

Siebel Dedicated Web Client Log Files

For a stand-alone client (dedicated web client), the client's log file (Siebel*.log) is present in the log directory of the Siebel Dedicated Web client installation if client side logging is enabled. For more information about client side logging, refer to FAQ 1322.

Siebel Events and Event Logging

Most of the logging information is generated by setting logging levels for events that are defined in the Siebel event logging system. The log level setting is used to define the amount of information that is written to the log file. Log levels are set for event types. [Table 3](#) lists the log levels.

Table 3. Log Level Settings

Log and Severity Level	Description
0	Fatal
1	Errors
2	Warnings
3	Informational
4	Details
5	Diagnostic

When an event occurs, the severity level of the event (as defined by the event subtype) is compared with the log level of the event type. If the numerical value of the event severity level is equal to or lower than the numerical value of the event type log level, then the event is written to the log file.

If the numerical value of the event severity level is higher than the numerical value of the event type log level, then the event is ignored.

Error Messages

Both Siebel CRM and i-flex FLEXCUBE generate error messages associated with this integration. The following topics cover most of these error messages:

- [Siebel CRM Process Turned Off on page 93](#)
- [i-flex Process Unavailable on page 93](#)
- [BPEL Down on page 93](#)
- [i-flex Error Messages on page 93](#)

- [Siebel CRM Error Messages on page 113](#)

Siebel CRM Process Turned Off

When the Siebel CRM process is turned off, you may get one or more of the following errors when using Siebel CRM:

- **SBL-BPR-00162.** Error invoking service <service name>, method 'process' at step 'CallWS'.
- **ORABPEL-02106.** Operation 'process' of Web Service <path> at port <port name> failed with the following explanation: <error number>.
- **SBL-EAI-04308.** The process class "CRMIntegAccountOriginationSEBL82ToFLEXUBS72Sync" has not been turned on. No operations on the process or any instances belonging to the process may be performed if the process is off.

i-flex Process Unavailable

When the i-flex process is turned off or the server is down, you may get one or more of the following errors when using Siebel CRM:

- Following Error Has Occurred in Process: Flow Name: <workflow name>
- **SBL-EXL-00151.** [Error] <server name>.bpel.client.BPELFault

BPEL Down

When BPEL is down, you may get one or more of the following errors when using Siebel CRM:

- **SBL-BPR-00162.** Error invoking service <service name>, method 'process' at step 'CallWS'.
- **SBL-EAI-04115.** Cannot connect to the server.

i-flex Error Messages

Table 4 lists the error codes produced by i-flex FLEXCUBE.

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Account Address	AC-ADUP01	Record already exists for the account number \$1 in branch \$2 for the location \$3 and for the media \$4	"\$1 = Account number \$2 = Branch code \$3 = Location \$4 = Media"
Account Address	AC-ADUP02	Value is invalid for the field \$1/ Record is Unauthorized or Closed.	\$1 = Name of the field which is invalid

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Account Address	AC-ADUP03	Default Address already available for the account number \$1	\$1 = Account number
Account Address	AC-ADUP04	Unexpected Internal Error in Uploading Customer Address during \$1 Phase	\$1 = The processing phase in which the address failed to get uploaded.
Account Address	AC-ADUP04	Unexpected Internal Error in Uploading Customer Address during \$1 Phase	""Insertion' 'Validation'"
Account Address	AC-ADUP05	Primary Address already defaulted	
Account Address	AC-ADUP07	\$1 Field cannot be Null	"\$1 = Field in the upload message Ex: Media, Branch, Message type"
Account Address	AC-ADUP09	Address details for the account \$1 in branch \$2 already exists. Cannot proceed	"\$1 = Account number \$2 = Branch code"
Account Address	AC-ADUP10	Account Number \$1 , Branch Code \$2 Combination Does Not Exist or is in Closed status	"\$1 = Account number \$2 = Branch code"
Account Address	AC-ADUP11	No account exists for external Ref No \$1	\$1 = External reference number of the account
Account Address	CS-MINMAX1	Number of copies cannot be less than zero or greater than 99	
Account Address	CUS-ADUP01	Address already exists for Customer No:\$1 Media:\$2 Location:\$3	"\$1 = Account number \$2 = Branch code"
Account Address	GW-ACADUP01	Message from external system may be invalid/improper for the external reference number \$1	
Account Address	MS-00029	Address1 not compatible with Swift Format	
Account/Term deposit Statement request	GW-STMT000	Account number or Branch code is NULL	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Account/Term deposit Statement request	GW-STMT002	No account exists for external Ref No \$1	
Account/Term deposit Statement request	GW-STMT006	Account Number \$1 , Branch Code \$2 Combination Does Not Exist or is in Closed status	\$1 = Account number, \$2 = Branch code
Account/Term deposit Statement request	GW-STMT01	Both Account And External Ref No Cannot Be Null	
BPEL Process Error	BPELERR-01	Error occurred in Common Object to FCUBS XML Transformation	
BPEL Process Error	BPELERR-02	Error in In-Value data translation	
BPEL Process Error	BPELERR-03	Error occurred in the call to FLEXCUBE Web Service	
BPEL Process Error	BPELERR-04	Error in Out-Value data translation	
BPEL Process Error	BPELERR-05	Error occurred in FCUBS to Common Object XML Transformation	
Common Gateway Errors	GW-AMND01	Factoryship details for Source [\$1] and Source Operation [\$2] not maintained	"\$1 = name of the external system sending the request \$2 = Name of the source operation in amendment "
Common Gateway Errors	GW-CLOB0001	Failed while creating the clob object	
Common Gateway Errors	GW-CLOB0002	Failed while freeing the clob object	
Common Gateway Errors	GW-CRTXML01	Failed while creating the response XML message	
Common Gateway Errors	GW-CRTXML01	Failed while creating the response XML message	
Common Gateway Errors	GW-CRTXML02	Failed while forming appending the child elements to the response XML	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Common Gateway Errors	GW-CRTXML02	Failed while forming appending the child elements to the response XML	
Common Gateway Errors	GW-ERR002	Unhandled exception in \$1	\$1 = Name of the operation in which the error occurred
Common Gateway Errors	GW-EXT002	Mandatory field \$1 should not be null	\$1 = This will be replaced by the field name which has NULL value
Common Gateway Errors	GW-NOSOURCE	Invalid Source	
Common Gateway Errors	GW-NOTF001	This combination of Branch code and Notification code is already existing	
Common Gateway Errors	GW-PARS0001	Failed while parsing the XML message	
Common Gateway Errors	GW-PARS0002	Failed while forming the TS list from the XML message	
Common Gateway Errors	GW-PARS0003	Failed while getting the child element for a node in the XML message	
Common Gateway Errors	GW-ROUT0001	Failed while extracting the header values from the incoming xml	
Common Gateway Errors	GW-ROUT0002	Not able to identify the source	
Common Gateway Errors	GW-ROUT0003	No data found for the service operation and source combination	
Common Gateway Errors	GW-ROUT0004	Invalid USER ID \$1	\$1 = FCUBS User ID who is doing the processing
Common Gateway Errors	GW-ROUT0005	User \$1 already Logged in FLEXCUBE	
Common Gateway Errors	GW-ROUT0006	Branch Code \$1 is not valid	\$1 = Branch code

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Common Gateway Errors	GW-ROUT0007	User not allowed to perform the action in the branch since the time level of the branch is more than that of the user	
Common Gateway Errors	GW-ROUT0008	User does not have the rights to perform the operation	
Common Gateway Errors	GW-ROUT0009	Invalid User or Branch	
Common Gateway Errors	GW-ROUT0010	Failed while validating the xml message against the XSD	
Common Gateway Errors	GW-ROUT0011	Failed while validating the xml message	
Common Gateway Errors	GW-ROUT0012	Duplicate message detected	
Common Gateway Errors	GW-ROUT0013	Failed while logging the message	
Common Gateway Errors	GW-ROUT0014	Failed while generating the message reference number	
Common Gateway Errors	GW-ROUT0015	Failed while selecting the response queue name for the given source code	
Common Gateway Errors	GW-ROUT0016	Source authentication failed for the source \$1	\$1 = The external system code which is sending the request
Common Gateway Errors	GW-ROUT0017	Failed while routing the XML message	
Common Gateway Errors	GW-ROUT0018	Branch code passed in the FCUBS_HEADER : [\$1] and FCUBS_BODY : [\$2] are different. Cannot proceed	"\$1 = Branch code \$2 = Branch code"
Customer Creation/ modification	AC-ADUP04	Unexpected Internal Error in Uploading Customer Address during \$1 Phase	'Insertion'
Customer Creation/ modification	AC-ADUP05	Primary Address already defaulted	
Customer Creation/ modification	CS-10000	New Customer Cannot be Created. Bank Parameters is Unauthorized.	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Customer Creation/ modification	CY-CDF13	Enter positive number	
Customer Creation/ modification	FT-SSN000	SSN Value should be entered.!	
Customer Creation/ modification	FT-SSN002	The format of ssn should be nnn- nn-nnnn	
Customer Creation/ modification	FT-SSN003	SSN value entered already exists	
Customer Creation/ modification	IFATM-002	Duplicate ATM Account Number.	
Customer Creation/ modification	IFATM-003	ATM Branch is not Maintained.	
Customer Creation/ modification	IF-UPL-14	Branch Code Invalid	"\$1 is Invalid Branch, \$2 is Local Branch in Customer Upload
Customer Creation/ modification	IF-UPL-23	Name and Address length cannot be more than 35 characters	
Customer Creation/ modification	IF-UPL-25	Mis Class \$1 Mandatory Is Missing	\$1 = MIS Class
Customer Creation/ modification	IF-UPL-34	Record No Cannot be NULL	
Customer Creation/ modification	IF-UPL-35	Value for sex has to be either M or F	
Customer Creation/ modification	IF-UPL-36	Value for deceased has to be either D or N	
Customer Creation/ modification	IF-UPL-37	Value for resident_status has to be either R or N	
Customer Creation/ modification	MS-00029	Swift Address length should be 8 or 11	
Customer Creation/ modification	ST-CIF02	This Short Name is already used	
Customer Creation/ modification	ST-CIF100	Algorithm Id cannot be NULL	
Customer Creation/ modification	ST-CIF101	FX Netting Customer cannot be NULL	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Customer Creation/ modification	ST-CIF24	Customer Unique Identifier Value and Name Combination does not make it unique	'Customer Unique Identifier'
Customer Creation/ modification	ST-CIF55	Customer Name cannot be one of the Customer Categories.	
Customer Creation/ modification	ST-CUS10	Account open date cannot be greater than today	
Customer Creation/ modification	ST-CUS12	Could not generate the check digit for the account. Change the control digits and try again.	
Customer Creation/ modification	ST-CUS55	Invalid Mis Group \$1	\$1 = MIS Group
Customer Creation/ modification	ST-CUS56	Invalid Mis Code \$1	\$1 = MIS Code
Customer Creation/ modification	ST-CUS58	Stale days cannot have zero, negative or decimal values	
Customer Creation/ modification	ST-CUS59	Stale days cannot be null	
Customer Creation/ modification	ST-CUS70	Cheque Book name is Not Entered Please check!	
Customer Creation/ modification	ST-CUST0001	Invalid customer type Identified	
Customer Creation/ modification	ST-CUST0006	Customer local branch should be the same as the current upload branch	
Customer Creation/ modification	ST-CUST0008	Address Details of the customer is missing	
Customer Creation/ modification	ST-CUST0008	Address Media is NULL	
Customer Creation/ modification	ST-CUST0010	Media is missing for the customer	
Customer Creation/ modification	ST-CUST0011	Address location is NULL	
Customer Creation/ modification	ST-CUST0011	Location of the customer is missing	
Customer Creation/ modification	ST-CUST0012	Customer in the req msg should be null when auto generation of customer number is set	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Customer Creation/ modification	ST-CUST0012	Error occurred while reading data from udef text labels	
Customer Creation/ modification	ST-CUST0013	Customer in the req msg cannot be null when auto generation of customer number is off	
Customer Creation/ modification	ST-CUST0013	Error occurred while inserting the udef text values	
Customer Creation/ modification	ST-CUST0014	Failed while defaulting the relationship	
Customer Creation/ modification	ST-CUST0015	Customer in the req msg should be null when auto gen is on	
Customer Creation/ modification	ST-CUST0016	Customer in the req msg cannot be null when auto gen is off	
Customer Creation/ modification	ST-EXP1	Exposure Category cannot be null	
Customer Creation/ modification	ST-MAN01	\$1 Cannot Be Null	\$1 can be one of the following 'Message Type'
Customer Creation/ modification	ST-PREF04	Prefix1 is not maintained in the Customer Prefix Maintenance	
Customer Creation/ modification	ST-PRP001	Error while logging Customer details for propagation	
Customer Creation/ modification	ST-REC01	This Record Already Exists	
Customer Creation/ modification	ST-REC02	Maximum number of accounts has been opened under this branch.	Branch Code
Customer Creation/ modification	ST-REC03	The account number is not between start and end account number.	
Customer Creation/ modification	ST-REF01	The XREF should be unique	
Customer Creation/ modification	ST-REL009	Invalid Customer \$1	\$1 = Customer Number
Customer Creation/ modification	ST-REL010	Invalid Relationship \$1	\$1 = Relationship name
Customer Creation/ modification	ST-TRN05	\$ 1 does not comply with swift character set	"\$1 can be one of the following

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Customer Creation/ modification	ST-UPCA0100	Validation digit for Modulo 9 Validation is not 0 or 9	
Customer Creation/ modification	ST-UPL-003	Generic Error in function fn_start_cust_amend	
Customer Creation/ modification	ST-UPLD101	unable to get process reference number	
Customer Creation/ modification	ST-UPLD11	Risk Category is Invalid	Risk Category'
Customer Creation/ modification	ST-UPLD30	Invalid Country Code \$1	\$1 = Country code
Customer Creation/ modification	ST-UPLD31	Invalid Customer Category \$1	\$1 = Customer Category name
Customer Creation/ modification	ST-UPLD32	Invalid language Code \$1	
Customer Creation/ modification	ST-UPLD33	Invalid Currency Code \$1	\$1 = Currency code
Customer Creation/ modification	ST-UPLD36	AML Group Cannot be NULL	\$1 = Anti Money Laundering group
Customer Creation/ modification	ST-UPLD37	Invalid AML Group \$1	
Customer Creation/ modification	ST-UPLD38	AML Group has to be NULL	
Customer Creation/ modification	ST-UPLD39	Invalid Group Code \$1	\$1 = Invalid group code
Customer Creation/ modification	ST-UPLD41	Invalid Cust Classification \$1	
Customer Creation/ modification	ST-UPLD42	Invalid Group Type \$1	\$1 = Invalid group type
Customer Creation/ modification	ST-UPLD43	Invalid value for Aml Required	
Customer Creation/ modification	UD-UDF-057	Failed to FN_GET_VALID_VALS for field name \$1.	\$1 = User defined Field name
Customer Creation/ modification	UPDUPLD-3	Data not maintained Properly for cstms_function_udf_fields_map	
Customer Creation/ modification	UPDUPLD-8	invalid Field Name	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	AC-ADUP01	Record already exists for the account number \$1 in branch \$2 for the location \$3 and for the media \$4	
Savings/Deposit Account creation	AC-ADUP02	Value is invalid for the field \$1/ Record is Unauthorized or Closed.	
Savings/Deposit Account creation	AC-ADUP04	Unexpected Internal Error in Uploading Customer Address during \$1 Phase	
Savings/Deposit Account creation	AC-ADUP07	\$1 Field cannot be Null.	
Savings/Deposit Account creation	AC-ADUP09	Address details for the account \$1 in branch \$2 already exists. Cannot proceed	
Savings/Deposit Account creation	AC-HOF01	Mandatory Fields Not Found	
Savings/Deposit Account creation	AC-HOF02	Nothing To Process	
Savings/Deposit Account creation	AC-HOF03	Invalid Action Code	
Savings/Deposit Account creation	AC-HOF04	Error during financial balancing	
Savings/Deposit Account creation	AC-HOF05	Duplication of Reference Number Detected. Cancel the Transaction and Exit the Form. Re-Input the Remaining Transaction in a New Batch.	
Savings/Deposit Account creation	AC-LKUP1	GL/Account not Authorized	
Savings/Deposit Account creation	AC-MAJ01	Financial Period AND/OR Financial Cycle for the branch ARE/IS NULL	
Savings/Deposit Account creation	AC-RECLOST	Instrument \$1 Reported to have been Lost.	
Savings/Deposit Account creation	CS-UDF-0002	\$1is not a valid field	
Savings/Deposit Account creation	CS-UDF-0091	Unhandled exception while validating text field	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	CS-UDF-0141	Unhandled exception while checking mask	
Savings/Deposit Account creation	CS-UDF-0152	For field \$1, the value \$2 is not a valid date	
Savings/Deposit Account creation	CS-UDF-0161	Unhandled exception while checking the date range	
Savings/Deposit Account creation	CS-UDF-0162	For field \$1, the value \$2 should be within the allowed period	
Savings/Deposit Account creation	CS-UDF017	VALUE NOT AVAILABLE IN LOV	
Savings/Deposit Account creation	CS-UDF018	INVALID FUNCTION AND FIELD_NAME COMBINATION	
Savings/Deposit Account creation	CY-9001	Insufficient parameters passed for getting the currency rates.	
Savings/Deposit Account creation	CY-CDF13	Enter positive number	
Savings/Deposit Account creation	CY-CDF14	Mandatory To visit the PC (Cr. or Dr. Auto Exchange Rate limits) screen	
Savings/Deposit Account creation	DE-TRACK01	Insufficient Funds for Contract Initiation; Proceed with Funds Tracking?	
Savings/Deposit Account creation	DE-TUD-002	Unhandled exception while uploading the transaction	
Savings/Deposit Account creation	DE-TUD-003	Mandatory Field Product Code is NULL	
Savings/Deposit Account creation	GW-ACC-001	Failed while retrieving ICEOD_STATUS for the \$1 branch. \$1 branch may not valid.	
Savings/Deposit Account creation	GW-ACC-002	ICEOD is running in \$1 branch. So Account/TD creation operation is not allowed.	\$1 = Branch code
Savings/Deposit Account creation	GW-ACC-100	ICEOD is running in \$1 branch. So Account/TD creation operation is not allowed.	
Savings/Deposit Account creation	GW-ACUP001	Invalid Auto Deposit Account \$1 specified	\$1 = Account number

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	GW-ACUP0015	Invalid Bank Name \$1 Mentioned	
Savings/Deposit Account creation	GW-ACUP002	Invalid Sweep Branch Code \$1 specified	\$1 = Sweep Branch code
Savings/Deposit Account creation	GW-ACUP003	Invalid Deposit Currency Code \$1 specified	\$1 = Currency code
Savings/Deposit Account creation	GW-ACUP004	Invalid Sweep to Account \$1 specified	\$1 = Sweep account number
Savings/Deposit Account creation	GW-ACUP005	Could not populate auto deposit details	
Savings/Deposit Account creation	GW-ACUP006	Invalid Charge Product\$1 Specified	
Savings/Deposit Account creation	GW-ACUP007	Could not populate Charge Slab Details	
Savings/Deposit Account creation	GW-ACUP008	Could not populate Charge Console Details	
Savings/Deposit Account creation	GW-ACUP009	Invalid Product Code \$1 Specified for Restriction	
Savings/Deposit Account creation	GW-ACUP010	Could not populate Product Restrictions Details	
Savings/Deposit Account creation	GW-ACUP016	Could not populate IC Product Details	
Savings/Deposit Account creation	GW-ACUP017	Invalid Transaction Code \$1 Specified for Restriction	
Savings/Deposit Account creation	GW-ACUP018	Could not populate Transaction Code Restrictions	
Savings/Deposit Account creation	GW-ACUP020	More than One Product for TD Upload Specified	
Savings/Deposit Account creation	GW-ACUP021	Unhandled Exception during SlimInt Population	
Savings/Deposit Account creation	GW-ACUP022	Invalid Debit Rate Code \$1 Specified	
Savings/Deposit Account creation	GW-ACUP023	Invalid Credit Rate Code \$1 Specified	
Savings/Deposit Account creation	GW-ACUP024	Unhandled Exception During IC Details Population	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	GW-ACUP026	Could not populate Funding Details	
Savings/Deposit Account creation	GW-ACUP027	UnHandled Exception During population of Funding Details	
Savings/Deposit Account creation	GW-ACUP25	Invalid Funding Account \$1 Specified	
Savings/Deposit Account creation	GW-AMND01	Factoryship details for Source [\$1] and Source Operation [\$2] not maintained	
Savings/Deposit Account creation	GW-ROUT0018	Branch code passed in the FCUBS_HEADER : [\$1] and FCUBS_BODY : [\$2] are different. Cannot proceed	
Savings/Deposit Account creation	IC-0016	Entered Charge Start Date is a holiday.	
Savings/Deposit Account creation	IC-BOD007	Enter Valid Next Maturity Date	
Savings/Deposit Account creation	IC-BOD008	Enter Valid Roller Amount	
Savings/Deposit Account creation	IC-BOD009	Enter Valid Maturity Date	
Savings/Deposit Account creation	IC-BOD016	Interest/Charge Book A/c must be RD A/c for AutoRollover	
Savings/Deposit Account creation	IC-BOD017	Calculation Account must be RD A/c	
Savings/Deposit Account creation	IC-BOD017	Calculation Account must be RD A/c	
Savings/Deposit Account creation	IC-BOD030	For Auto Rollover with Principal, Principal liquidation a/c must be TD a/c	
Savings/Deposit Account creation	IC-BOD031	For Auto Rollover with Principal, Interest liquidation a/c must not be TD a/c	
Savings/Deposit Account creation	IC-BOD032	For Auto Rollover with Principal+Interest, Principal liquidation a/c must be TD a/c	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	IC-BOD033	For Auto Rollover with Principal+Interest, Interest liquidation a/c must be TD a/c	
Savings/Deposit Account creation	IC-BOD034	For Close on Maturity Principal liquidation a/c must not be TD a/c	
Savings/Deposit Account creation	IC-BOD035	For Close on Maturity Interest liquidation a/c must not be TD a/c	
Savings/Deposit Account creation	IC-BOD036	For Auto Rollover with Special Amount, Principal liquidation a/c must not be TD a/c	
Savings/Deposit Account creation	IC-BOD037	For Auto Rollover with Special Amount, Interest liquidation a/c must not be TD	
Savings/Deposit Account creation	IC-BOD21	Principal Liquidation account cannot be null or same as deposit account	
Savings/Deposit Account creation	IC-INSTR01	Account No. cannot be Null	
Savings/Deposit Account creation	IC-INSTR02	Account No. and sweep to Account cannot be the same	
Savings/Deposit Account creation	IC-INSTR03	Sweep to Account must be unique	
Savings/Deposit Account creation	IC-INSTR05	Retry Till Date cannot be less than Today's Date	
Savings/Deposit Account creation	IC-INSTR06	Start Date cannot be less than Today's Date	
Savings/Deposit Account creation	IC-INSTR07	Start Date cannot be NULL	
Savings/Deposit Account creation	IC-INSTR10	Retry Till Date cannot be less than Start Date	
Savings/Deposit Account creation	IC-PR052	Either Discount Amount or Discount Percentage can be maintained	
Savings/Deposit Account creation	IC-SI002	A record already exists for this date	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	IC-SI003	Effective Date Cannot be null	
Savings/Deposit Account creation	IC-SP001	Enter a valid product code.	
Savings/Deposit Account creation	IC-SP003	Slab/Tier amount already exists	
Savings/Deposit Account creation	IFATM-002	Duplicate ATM Account Number.	
Savings/Deposit Account creation	IFATM-003	ATM Branch is not Maintained.	
Savings/Deposit Account creation	IF-DAT013	Can not Upload Contract for External Reference Number, \$1	
Savings/Deposit Account creation	LD-ACN016	Unhandled Exception in Accounting Entry Function	
Savings/Deposit Account creation	LD-ACN017	Unhandled Exception in Accounting Entry Function	
Savings/Deposit Account creation	LD-PRV1	The NORM status is mandatory	
Savings/Deposit Account creation	MI-DEF02	MIS Details could not be defaulted from account class / Product	
Savings/Deposit Account creation	MI-DEF99	MIS Details not entered	
Savings/Deposit Account creation	MI-MNT23	Rate Code is Null	
Savings/Deposit Account creation	MI-MNT24	Refinance Spread is Null	
Savings/Deposit Account creation	MS-00029	Swift Address length should be 8 or 11	
Savings/Deposit Account creation	ST-ACC-100	Unhandled Exception during - \$1	
Savings/Deposit Account creation	ST-ACC-101	Account Number [\$1] length is more than Account Mask [\$2] length.	
Savings/Deposit Account creation	ST-ACC-102	Account Class [\$1] is Invalid.	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	ST-ACC-103	Currency Code [\$1] is either Invalid or Restricted for Account Class [\$2].	
Savings/Deposit Account creation	ST-ACC-104	Clearing Bank Code [\$1] is Invalid.	
Savings/Deposit Account creation	ST-ACC-105	Customer Code [\$1] is either Invalid or Restricted for Account Class [\$2].	
Savings/Deposit Account creation	ST-ACC-106	Customer Account and Funding Account Can not be Same.	
Savings/Deposit Account creation	ST-ACC-107	Funding Branch [\$1] for the Customer is not Valid.	
Savings/Deposit Account creation	ST-ACC-108	Funding Account [\$1] for the Customer is not Valid.	
Savings/Deposit Account creation	ST-ACC-109	Funding Account should be Null.	
Savings/Deposit Account creation	ST-ACC-110	Funding Branch should be Null.	
Savings/Deposit Account creation	ST-ACC-111	Reorder check validation failed	
Savings/Deposit Account creation	ST-ACC-112	Wrong Value for Auto Reorder Check level and Check leaves	
Savings/Deposit Account creation	ST-ACC-113	Account Status [\$1] passed is not Valid.	
Savings/Deposit Account creation	ST-ACC-114	Exposure Category [\$1] is not Valid.	
Savings/Deposit Account creation	ST-ACC-115	GL Line/Code [\$1] is not Valid.	
Savings/Deposit Account creation	ST-ACC-116	Joint Holder Type [\$1] is not Valid.	
Savings/Deposit Account creation	ST-ACC-117	Joint Holder Code [\$1] is not Valid.	
Savings/Deposit Account creation	ST-ACC-118	Upload/Insertion Failed for [\$1]	
Savings/Deposit Account creation	ST-ACC-119	Roll Over Amount Can not be Zero for Rollover Type S.	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	ST-ACC-120	GL Code is not Maintained for the Branch [\$1] and Pay In Option [\$2].	
Savings/Deposit Account creation	ST-ACC-121	[\$1] is Invalid.	
Savings/Deposit Account creation	ST-ACC-122	Duplicate BIC Code Mentioned.	
Savings/Deposit Account creation	ST-CAC99	Booking Account Not Valid.	
Savings/Deposit Account creation	ST-CAC99	Booking Account Not Valid.	
Savings/Deposit Account creation	ST-CUS06	Update Of Account Failed	
Savings/Deposit Account creation	ST-CUS10	Account open date cannot be greater than today	
Savings/Deposit Account creation	ST-CUS12	Could not generate the check digit for the account. Change the control digits and try again.	
Savings/Deposit Account creation	ST-CUS17	Joint-Holder already Exists	
Savings/Deposit Account creation	ST-CUS18	Primary Customer cannot be maintained as a joint holder	
Savings/Deposit Account creation	ST-CUS30	This IBAN A/c No. is already maintained	
Savings/Deposit Account creation	ST-CUS58	Stale days cannot have zero, negative or decimal values	
Savings/Deposit Account creation	ST-CUS96	Product not maintained for this Account	
Savings/Deposit Account creation	ST-CUS97	Special Condition not maintained for this Account	
Savings/Deposit Account creation	ST-CUS98	TD Details Not Maintained properly for this Account	
Savings/Deposit Account creation	ST-CUS99	Booking TD Account Failed	
Savings/Deposit Account creation	ST-EXP1	Exposure Category cannot be null	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	ST-IBAN09	Failed in generation of check digit number	
Savings/Deposit Account creation	ST-IBAN10	Generated Check digit number and check digit input are different	
Savings/Deposit Account creation	ST-MAN01	Failed in generation of check digit number	
Savings/Deposit Account creation	ST-RD001	Generated Check digit number and check digit input are different	
Savings/Deposit Account creation	ST-REC01	This Record Already Exists	
Savings/Deposit Account creation	ST-REC02	Maximum number of accounts has been opened under this branch.	
Savings/Deposit Account creation	ST-REC03	The account number is not between start and end account number.	
Savings/Deposit Account creation	ST-REC03	The account number is not between start and end account number.	
Savings/Deposit Account creation	ST-REL006	Mandatory Fields in Relationship is Null	
Savings/Deposit Account creation	ST-REL007	Duplication of Records Occurred	
Savings/Deposit Account creation	ST-REL008	Duplication of Primary	
Savings/Deposit Account creation	ST-STM05	GL lines for NORMAL Status not maintained	
Savings/Deposit Account creation	ST-TD-100	\$1 is mandatory.	
Savings/Deposit Account creation	ST-TD-104	Interest or Principal cannot be moved to unclaimed if the deposit is closing on maturity	
Savings/Deposit Account creation	ST-TD-105	Auto rollover cannot be allowed if the deposit is closing on maturity	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Savings/Deposit Account creation	ST-TD-108	TD Amount cannot be null or less than zero	
Savings/Deposit Account creation	ST-TD-110	Cannot Move Principal to Unclaimed when Auto Rollover is Checked	
Savings/Deposit Account creation	ST-TD-129	Offset Account cannot be null	
Savings/Deposit Account creation	ST-TRN05	This does not comply with swift character set	
Savings/Deposit Account creation	ST-UPCA0007	Unhandled exception in function which validates linked entities.	
Savings/Deposit Account creation	ST-UPCA0053	Unhandled exception in function which validates linked entities.	
Savings/Deposit Account creation	ST-UPCA0075	No customer account exist to amend. Could not proceed.	
Savings/Deposit Account creation	ST-UPCA0100	Validation digit for Modulo 9 Validation is not 0 or 9	
Savings/Deposit Account creation	ST-UPL-001	Generic Error \$1	
Savings/Deposit Account creation	ST-VAT01	Failed while validating for VAT accounts	
Savings/Deposit Account creation	ST-VAT02	Invalid combination of Dr and Cr Accounts	
Savings/Deposit Account creation	UD-UDF-053	For field \$1, the value \$2 is not a unique value	
Savings/Deposit Account creation	UD-UDF-059	For field \$1, the value \$2 is not per of mask \$3	
SCV Account details	GW-SCV003	Account number is invalid	
SCV Account details	GW-SCV009	Module \$1 is unsupported in Single Customer View	
SCV Account details	GW-SCV010	Unexpected error when processing the query request	
SCV Account details	GW-STMT006	Account Number \$1 , Branch Code \$2 Combination Does Not Exist or is in Closed status	
SCV Account details	ST-MAN01	\$1 Cannot be NULL	\$1 = Branch code

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
SCV Summary details	GW-SCV001	Both customer number and external reference number are null	
SCV Summary details	GW-SCV002	No record exists for the customer \$1 and external reference number \$2	
SCV Summary details	GW-SCV004	No customer record exists for the external reference number \$1	
SCV Summary details	GW-SCV005	The Customer No \$1 Is Not A Valid One	
SCV Transaction details	GW-SCV008	No Transactions exist for Account Number \$1 in the Branch \$2	
SCV Transaction details	GW-SCV009	Module \$1 is unsupported in Single Customer View	
SCV Transaction details	GW-SCVT007	From Date Cannot Be Greater Than To Date	
SCV Transaction details	GW-STMT006	Account Number \$1 , Branch Code \$2 Combination Does Not Exist or is in Closed status	
SCV Transaction details	GW-STMT012	Account number and/or branch code is NULL	
Term Deposit Rollover	GW-ACC-001	Failed while retrieving ICEOD_STATUS for the \$1 branch. \$1 branch may not valid.	\$1 = Branch code
Term Deposit Rollover	GW-ACC-002	ICEOD is running in \$1 branch. So Account/TD creation operation is not allowed.	\$1 = Branch code
Term Deposit Rollover	GW-STMT001	Both Account And External Ref No Cannot Be Null	
Term Deposit Rollover	GW-STMT002	No account exists for external Ref No \$1	\$1 = External reference number
Term Deposit Rollover	GW-STMT006	Account Number \$1 , Branch Code \$2 Combination Does Not Exist or is in Closed status	"\$1 = Account number \$2 = Branch code"
Term Deposit Rollover	IC-BOD016	Interest/Charge Book A/c must be RD A/c for AutoRollover	

Table 4. Error Codes from i-flex FLEXCUBE

Operation Name	Error Codes	Error Description	Error Parameter
Term Deposit Rollover	IC-BOD030	For Auto Rollover with Principal, Principal liquidation a/c must be TD a/c	
Term Deposit Rollover	IC-BOD031	For Auto Rollover with Principal, Interest liquidation a/c must not be TD a/c	
Term Deposit Rollover	IC-BOD032	For Auto Rollover with Principal+Interest, Principal liquidation a/c must be TD a/c	
Term Deposit Rollover	IC-BOD033	For Auto Rollover with Principal+Interest, Interest liquidation a/c must be TD a/c	
Term Deposit Rollover	IC-BOD034	For Close on Maturity Principal liquidation a/c must not be TD a/c	
Term Deposit Rollover	IC-BOD035	For Close on Maturity Interest liquidation a/c must not be TD a/c	
Term Deposit Rollover	IC-BOD036	For Auto Rollover with Special Amount, Principal liquidation a/c must not be TD a/c	
Term Deposit Rollover	IC-BOD037	For Auto Rollover with Special Amount, Interest liquidation a/c must not be TD a/c	
Term Deposit Rollover	ST-CUS97	Special Condition not maintained for this Account	

Siebel CRM Error Messages

Table 5 lists the error messages for Siebel CRM.

Table 5. Siebel CRM Error Messages

Error Code	Error Message
SBL-FIN-00100	Data Transfer Utilities failed to find the active business component.
SBL-FIN-00101	External exception occurs in the Data Transfer Utilities.
SBL-FIN-00102	An internal error has occurred in the Data Transfer Utilities.
SBL-FIN-00103	%1 is an unknown Invoke From command in Data Transfer Utilities.
SBL-FIN-00104	%1 is an incorrect data map component name.

Table 5. Siebel CRM Error Messages

Error Code	Error Message
SBL-FIN-00105	An error occurs in determining the parent data map component.
SBL-FIN-00106	An error occurs in locating the data map object %1.
SBL-FIN-00107	Unknown operation %1 is encountered in Data Transfer Utilities.
SBL-FIN-00108	The radius must be greater than zero.
SBL-FIN-00109	You have reached the end of the application.
SBL-FIN-00110	There are no products selected.
SBL-FIN-00111	There are no views specified for the products selected.
SBL-FIN-00112	You are already at the first view required for the current application.
SBL-FIN-00113	Business component conflict. Please apply business component %s to either parent applet or popup applet.
SBL-FIN-00114	Error in map user property of business service %1.
SBL-FIN-00115	MQ Series parameters for application data exchange are not found in System Preferences.
SBL-FIN-00116	Applet: '%1', control or list item: '%2', has one or more incorrect user properties: '%3'.
SBL-FIN-00117	There is no applet instance specified. Please enter at least one applet instance for this Dynamic Applet.
SBL-FIN-00118	There is no field instance specified. Please enter at least one field instance for this Dynamic Applet.
SBL-FIN-00119	There is no view instance specified. Please enter at least one view instance for this Dynamic Applet.
SBL-FIN-00120	Applet '%1' does not exist.
SBL-FIN-00121	Drilldown '%1' does not exist.
SBL-FIN-00122	Field '%1' does not exist.
SBL-FIN-00123	JavaScript Manager does not exist.
SBL-FIN-00124	Method '%1' does not exist.
SBL-FIN-00201	Invalid expression. Please make sure the expression is valid.
SBL-FIN-00202	Invalid node in parse tree.
SBL-FIN-00203	Variable not found.
SBL-FIN-00204	Invalid operation found in expression.
SBL-FIN-00205	No expression to be evaluated.
SBL-FIN-00210	BRP Runtime Error %1.
SBL-FIN-00211	BRP Runtime Error: %1 is recursively invoked.

Table 5. Siebel CRM Error Messages

Error Code	Error Message
SBL-FIN-00212	BRP Runtime Error: duplicate property %1 is defined.
SBL-FIN-00213	BRP Runtime Error: undefined process %1.
SBL-FIN-00214	BRP Runtime Error: undefined property %1.
SBL-FIN-00215	BRP Runtime Error: undefined procedure %1.
SBL-FIN-00216	BRP Runtime Error: output argument %1 has an incorrect type.
SBL-FIN-00217	BRP Runtime Error: properset Set operation has a wrong expression.
SBL-FIN-00218	BRP Runtime Error: a looped statement step does not have a condition.
SBL-FIN-00219	BRP Init Error: %1.
SBL-FIN-00220	BRP Runtime Error: Loop exceeds the maximum iteration number.
SBL-FIN-00250	BRP Runtime Error: no execution path for the switch step and no default switch block defined.
SBL-FIN-00251	Unknown named parameter %1 is used in Data Transfer Utilities.
SBL-FIN-00252	User property %s of business component %s has either missing or improper setting.

Troubleshooting Techniques

When a BPEL process fails to complete successfully the starting point to identify the point of failure is the BPEL Console. In the BPEL Console application and click the Instances tab. This displays a list of BPEL instances which were invoked for execution on that BPEL server. By default the rows are sorted by the Last Modified column.

To find errors, look for rows marked with an error icon. The error icon is a yellow triangle with an exclamation point (!) in it. To display details on the errored row, click the hyperlink under the instance name. In the detailed view, click the Flow tab. This displays a graphical representation of the BPEL flow. The step where the error occurred is highlighted in red. When you identify the error step, look at the request and response payload to get an understanding of the problem.

If a customer (contact) synchronization fails, make sure all fields have valid data. For example, make sure that Branch is not Null.

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