

Servicing Configurations User Guide

Oracle Banking Branch

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Servicing Configurations User Guide

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1 Preface

1.1 Introduction

Welcome to the Servicing Configurations User Guide for the Oracle Banking Branch. It provides an overview of how to configure the Business Product Configuration, Business Process, and related workflows for servicing of Customer Account Transactions, Term Deposit Transactions, and Loan Transactions.

1.2 Audience

This user guide is intended for back-office and front-end staff who setup and use Oracle Banking Branch.

1.3 Document Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

1.4 Acronyms and Abbreviations

The list of the acronyms and abbreviations that you are likely to find in the manual are as follows:

Table 1: Acronyms and Abbreviations

| Abbreviation | Description |
|---------------------|-----------------------|
| System | Oracle Banking Branch |

1.5 List of Topics

This user guide is organized as follows:

Table 2: List of Topics

| Topics | Description |
|---------------------------------|---|
| Configurations | This topic provides detailed information about configurations that needs to be performed for Servicing transactions. |
| Error Codes and Messages | This topic provides the error messages that you encounter while working with Servicing Configurations in Oracle Banking Branch. |
| List of Menus | Provides a list of menus arranged in alphabetical order. |

1.6 Related Documents

The related documents are as follows:

1. Getting Started User Guide
2. Oracle Banking Branch Guide

1.7 Symbols

Following symbols are used in this guide:

Table 3: List of Symbols

| Symbol | Function |
|---------------|--------------------|
| → | Represents Results |

2 Servicing Configurations

This chapter is designed to help you quickly get acquainted with the Servicing Configurations for Oracle Banking Branch.

Pre-requisites

Specify **User Id** and **Password**, and login to **Home screen**.

→ The **Home screen** is displayed.

This chapter includes following sections:

- [2.1 Introduction](#)
- [2.2 Business Product Configuration](#)
- [2.3 Business Process Configuration](#)

2.1 Introduction

Oracle Banking Branch is a retail banking application that gives a 360-degree view of the customer financial and non-financial transactions. It helps to provide better customer-focused services as well as cross-sell and up-sell the other products and services of the bank. This document provides an overview of the configurations that are required for the various Oracle Banking Branch processes.

Oracle Banking Branch is factory shipped with referenced workflows for the servicing. It is capable of configuring the workflows based on the bank's internal policy and requirements. Configurations such as Business Product and Business Process allows the bank to define their own workflows. The brief summary of the configurations is described as below:

The Servicing in Oracle Banking Branch are driven based on the below configurations:

- Business Product
- Business Process

2.2 Business Product Configuration

Business Product Configuration allows you to configure the various services for Retail Bank offerings. The details captured in the Business Products configuration are used for processing the servicing transactions.

The Business Product created in Oracle Banking Branch are linked with the Host Product. It is important to note that there is only one Golden Source for Product creation or configuration, which is in the HOST. The Business Product created in Oracle Banking Branch allows to configure parameters that are more customer facing and how the products are sold in Banks.

The Business Product is linked to the Business Process, so that the servicing transactions related to the selected Business Product will flow as per the Business Process Definition.

The Business Product process allows to create Business Product and view the existing Business Products; the details of that are explained in the further sections.

This section includes following subsections:

- [2.2.1 Create Business Product](#)
- [2.2.2 View Business Product](#)

2.2.1 Create Business Product

The Create Business Product configuration process comprises of the below mentioned data segments, allowing you to define the various elements for the products:

- Business Product Details
- Host Product Mapping

The Business Product Details is the first data segment of Create Business Product application. To process this screen, type **Create Business Product** in the Menu Item Search located at the left corner of the application toolbar and select the appropriate screen (or) do the following steps:

1. From **Home screen**, click **Servicing Configurations**. Under **Servicing Configurations**, click **Business Product**.
2. Under **Business Product**, click **Create Business Product**.

→ The **Create Business Product** screen is displayed.

Figure 1: Create Business Product – Business Product Details

3. Specify the details in the **Business Product Details** segment. The data fields which are marked with asterisk are mandatory. For more information on menus, refer to [Table 4: Create Business Product – Business Product Details – Field Description](#).

Table 4: Create Business Product – Business Product Details – Field Description

| Field | Description |
|-------------------------------------|--|
| Product Type | <p>Select the product from the drop-down list.</p> <p>Available options are:</p> <ul style="list-style-type: none"> • Customer Account Services • Term Deposit Account Services • Loan Account Services |
| Product Sub Type | <p>Select the product sub-type from the drop-down list.</p> <p>Product sub-types supported are based on the Product Type selected.</p> <ol style="list-style-type: none"> a. Customer Account Services <ul style="list-style-type: none"> ▪ Scheduled Transfer ▪ Sweep In to Account ▪ Sweep Out from Account b. Term Deposit Account Services c. Loan Account Services |
| Business Product Code | <p>Specify the business product code.</p> <p>NOTE: Maximum length of business product code should not be more than 6 characters. Alphanumeric and alphabets should be in capital.</p> |
| Business Product Description | <p>Specify the business product description.</p> |
| Channel Allowed | <p>Select the channels that should be allowed for the business product from the drop-down list. For Example – Oracle Banking Digital Experience.</p> |
| Fintech Allowed | <p>Select if the business product is supported for servicing transaction from Fintech Companies.</p> |

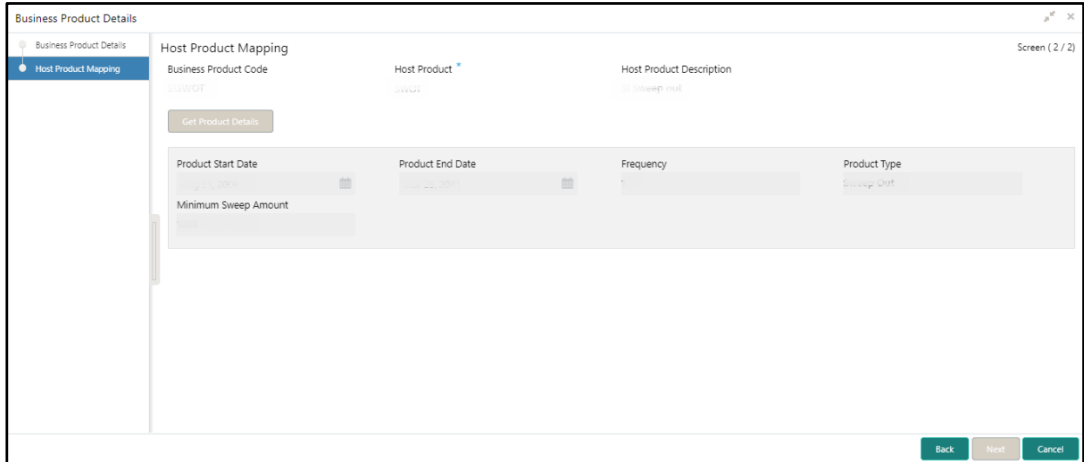
| Field | Description |
|--------------------------------|---|
| <p>Fintech Name</p> | <p>Select the Fintech Company name from the drop-down list. System allows selection of multiple companies.</p> <p>NOTE: This field is mandatory, if Fintech Allowed is selected.</p> |
| <p>Back</p> | <p>Click Back to navigate to the previous data segment within a stage.</p> <p>NOTE: Since this is the first screen on the workflow, Back will be disabled.</p> |
| <p>Next</p> | <p>Click Next to navigate to the next data segment, after successfully capturing the data.</p> <p>NOTE: Specify the details in the mandatory fields before you proceed to next data segment. System will validate for all mandatory data segments and data fields. If mandatory details are not provided, system displays an error message for the user to take action.</p> |
| <p>Save & Close</p> | <p>Click Save & Close to save the data captured, the saved data will be available in View Business Product with status In Progress. The user can work on it later from picking it from the View Business Product.</p> |
| <p>Cancel</p> | <p>Click Cancel to close the Business Product screen, screen get closed without saving the data.</p> |

- Click **Next** in **Business Product Details** segment to proceed with next data segment, after you specify the data.

→ The **Host Product Mapping** segment is displayed.

NOTE: In this data segment, the business product is mapped to the host product and parameters for processing servicing transactions are defined.

Figure 2: Create Business Product – Host Product Mapping



- Specify the details in the **Host Product Mapping** segment. The data fields which are marked with asterisk are mandatory. For more information on fields, refer to [Table 5: Create Business Product – Host Product Mapping - Field Description](#).

Table 5: Create Business Product – Host Product Mapping - Field Description

| Field | Description |
|---------------------------------|--|
| Business Product Code | Displays the business product code defaulted from Business Product Code entered in the Business Product Details data segment. |
| Host Product | Select the host product from the drop-down list. |
| Host Product Description | Displays the product description once the host product is selected in Select Host Product . |

| Field | Description |
|-----------------------------|--|
| Get Products Details | <p>Click Get Product Details, and the system will default the parameter configured at host product. When you click this button, the system defaults the values in the following fields:</p> <ul style="list-style-type: none"> • Product Start Date • Product End Date • Frequency • Product Type • Minimum Sweep Amount |
| Product Start Date | Default the Product Start Date from host. |
| Product End Date | Default the Product End Date from host. |
| Frequency | Default the frequency from host. |
| Product Type | Default the Product type from host. |
| Minimum Sweep Amount | <p>Displays the minimum sweep amount defaulted from host.</p> <p>NOTE: This field is displayed only if the Product Sub Type in Business Product Details segment is selected as Sweep Out from Account or Sweep In to Account.</p> |
| Back | Click Back to navigate to the previous data segment within a stage. |
| Next | <p>Click Next to navigate to the next data segment, after successfully capturing the data.</p> <p>Specify the details in the mandatory fields before you proceed to next data segment. System will validate for all mandatory data segments and data fields. If mandatory details are not provided, system displays an error message for the user to take action.</p> |

| Field | Description |
|-------------------------|--|
| Save & Close | Click Save & Close to save the data captured, the saved data will be available in View Business Product with status In Progress . The user can work on it later from picking it from the View Business Product . |
| Cancel | Click Cancel to close the Business Product screen, it get closed without saving the data. |

2.2.2 View Business Product

Oracle Banking Branch supports to view the business product created. The View Business Product allows the user to view all of the authorized, un-authorized and closed business product. Authorize option is also available for supervisor users for approving un-authorized business product.


To process this screen, type **View Business Product** in the Menu Item Search located at the left corner of the application toolbar and select the appropriate screen (or) do the following steps:

1. From **Home screen**, Click on **Servicing Configurations**. Under **Servicing Configurations**, click **Business Product**.
2. Under **Business Product**, click **View Business Product**.

→ The **View Business Product** screen is displayed.

Figure 3: View Business Product



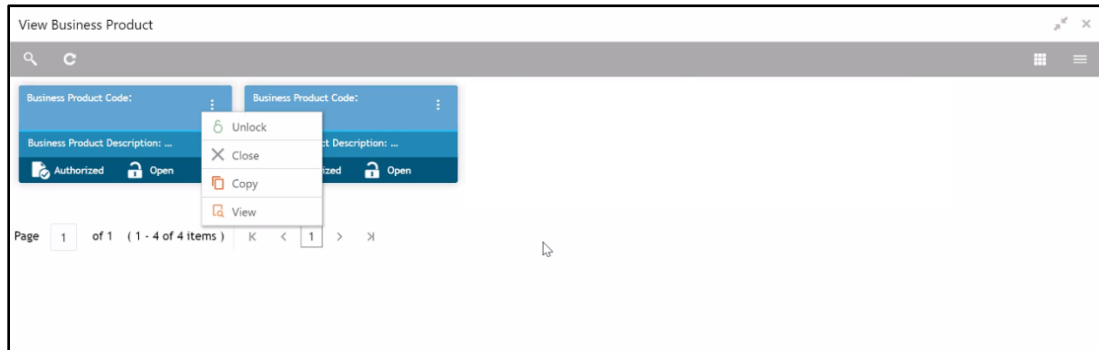
- Click  icon on the top right-hand side of the business product tile.

Pre-condition

Only if business product is authorized.

→ The following **View Business Product Pop-up** is displayed.

Figure 4: View Business Product Pop-Up

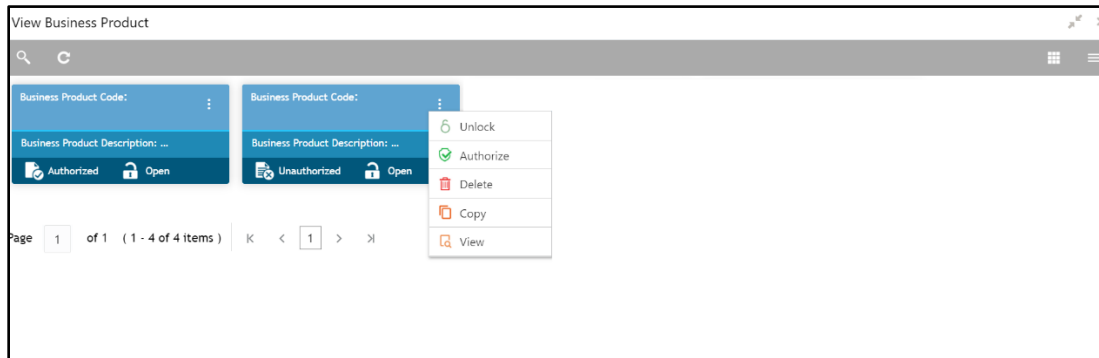


Pre-condition

Only if business product is un-authorized.

→ The following **View Business Product Pop-up** is displayed.

Figure 5: View Business Product Pop-Up



For more information on options, refer to [Table 6: View Business Product - Field Description](#).

Table 6: View Business Product - Field Description

| Field | Description |
|------------------|---|
| Unlock | <p>As specified in Figure 4 and Figure 5, this option is common for authorized and un-authorized business product. Click Unlock to edit the business product information in Create Business Product data segment.</p> <p>System will not allow to edit the following fields:</p> <ul style="list-style-type: none"> • Product Type • Product Sub-Type • Business Product Code <p>Make the required changes in the other relevant data segment and submit the business product.</p> |
| Close | <p>Click Close to close the business products that are no more relevant for banking product offering. User can close only authorized business products.</p> |
| Copy | <p>Click Copy to copy the authorized or un-authorized business products to quickly create new business product.</p> |
| View | <p>Click View to view the authorized or un-authorized business products.</p> |
| Authorize | <p>User with supervisor access will be able to authorize the un-authorized business product. Once approved, the business product status changes to 'Authorized' and is available for linking in the Business Process.</p> |
| Delete | <p>Click Delete to delete the business products that are un-authorized and no more required.</p> |

2.3 Business Process Configuration

Oracle Banking Branch is equipped with Business Process configuration helping banks to build desired workflow for servicing transactions by defining the stages, respective data segments, checklists, documents required and advice generation for the stages.

A business process can be defined as a set of activities and tasks that, once completed, will accomplish the distinct servicing processes. The business process must involve clearly defined inputs and a single output.

The business process definition will determine the different stages which are required for a given combination of the process code, life cycle and business product code. The workflow management of these stages and the relevant stage movements are defined in Oracle Banking Microservices Architecture / Conductor to help us orchestrate the micro-services based process-flow and ensure seamless transition of Servicing process across various stages in that given order. The Oracle Banking Microservices Architecture / Conductor process will drive the workflow from one stage to another based on the process outcomes at the respective stages and subject to fulfilling of the mandatory data capture, confirmation on the mandatory checklist items and submission of mandatory documents at the respective stages. The stages defined in the business process can be dynamically assigned to different user profiles or roles.

During servicing transactions, the system picks the business process run-time and initiates the workflow based on the configuration.

The Prerequisites for configuring the Business Process are enumerated below:

- **Lifecycle**

Lifecycle represents the lifecycle of the process for which the Business Process is created. These are factory shipped codes and currently support Servicing Transactions such as Customer Account transactions, Term Deposit Transactions and Loan Account transactions.

- **Process Code**

Process Code defines the various stages relevant for the servicing transactions. Process Code configuration allows you to define the business process flow that needs to be mapped for the business product and lifecycle code combination in the Business Process configuration.

A set of default process codes are factory-shipped for the reference workflow. User can also create process codes in “CMC_TM_PROCESS_CODE” and “CMC_TM_PROCESS_STAGE” tables.

- **Business Product**

Business Product maintenance allows configuring the various business products in accordance with the product offerings that the bank deals in. Each business product has a unique business process defined for a specific lifecycle code selected.

This section includes following subsections:

- [2.3.1 Create Business Process](#)
- [2.3.2 View Business Process](#)

2.3.1 Create Business Process

The Create Business Process aids in configuring the workflow for Servicing Transactions. As mentioned earlier, this process will allow to define the data segments, checklists, documents and advices for the stages defined in the process code selected for the lifecycle code and business product combination.

The Create Business Process configuration allows to configure the below elements for each of the stages of the Servicing Transactions:

- a. Data Segment - A data segment, as the name suggests is an individual block of data. Bringing in data segments allows to break down a huge process into smaller units, which will be easier to update, maintain and process. Business Process will consists of such several data segments that makes up the stage.

Business Process Definition enables the user to perform the following:

- Add n number of data segments to each stage.
 - Set the data segment as mandatory or non-mandatory.
 - Set the data segment as editable or non-editable.
 - Control the sequence order of the data segments.
 - Select the stage.
- b. Document - The documents are required to be submitted by the customer for the Servicing Transactions.
 - c. Checklist - Checklist are the distinct, and the following steps describes list of mandatory check-points by the bank to its users to adhere to during the Servicing Transactions.

- d. Advices - Advices are official letter of notices detailing an action taken or to be taken on a stated date by the bank. This is the final configuration for the Business Process creation.

To process this screen, type **Create Business Process** in the Menu Item Search located at the left corner of the application toolbar and select the appropriate screen (or) do the following steps:

1. From **Home screen**, click **Servicing Configurations**. Under **Servicing Configurations**, click **Business Process**.
2. Under **Business Process**, click **Create Business Process**.

→ The **Create Business Process** screen is displayed.

Figure 6: Create Business Process

3. Specify the fields in the **Create Business Process** screen. The data fields which are marked with asterisk are mandatory. For more information on menus, refer to [Table 7: Create Business Process - Field Description](#).

Table 7: Create Business Process - Field Description

| Field | Description |
|-------------------------------------|---|
| Business Process Code | Specify an alphanumeric business process code. Maximum Length allowed is 16. |
| Business Process Description | Specify the description of the business process code. Maximum Length allowed is 60. |
| Lifecycle | Search and select the lifecycle code. |
| Lifecycle Description | Displays the description of the lifecycle selected. |
| Process Code | Search and select the process code of the business process flow that needs to be mapped for the lifecycle code and business process code combination. |

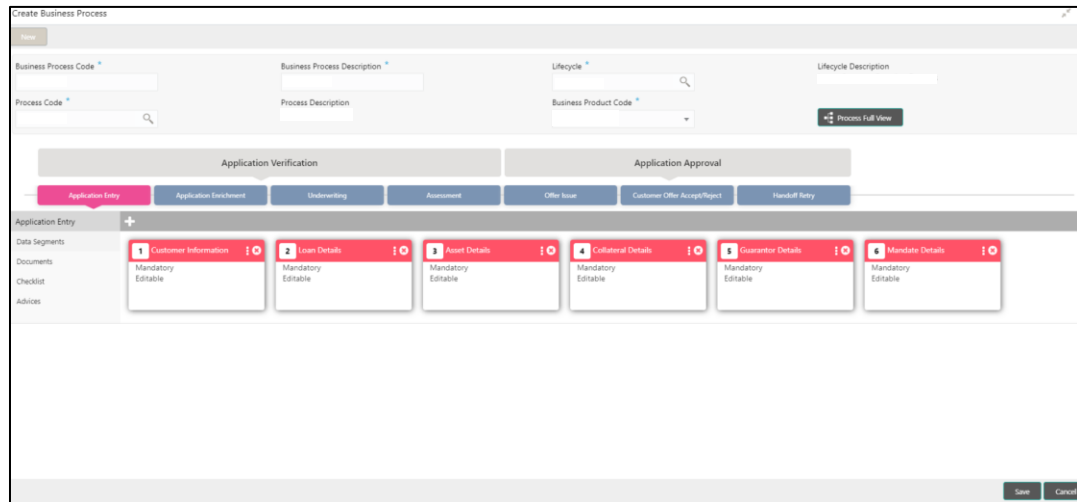
| Field | Description |
|------------------------------|--|
| Process Description | Displays the description of the selected process code. |
| Business Product Code | Specify the business product code for which the business process is being created. Alternatively, system allows to select 'All', in which case the business process will be applicable to all the business products that are associated with the Lifecycle and Process Code. |
| Save | To save the captured details, click Save . |
| Cancel | Click Cancel to close the Business Process screen, it get closed without saving the data. |

NOTE: System will allow you to configure only one business process for a combination of **Lifecycle** and **Business Product Code**.

4. Search and select the **Process Code**.

→ The **Create Business Process** screen with stages is displayed.

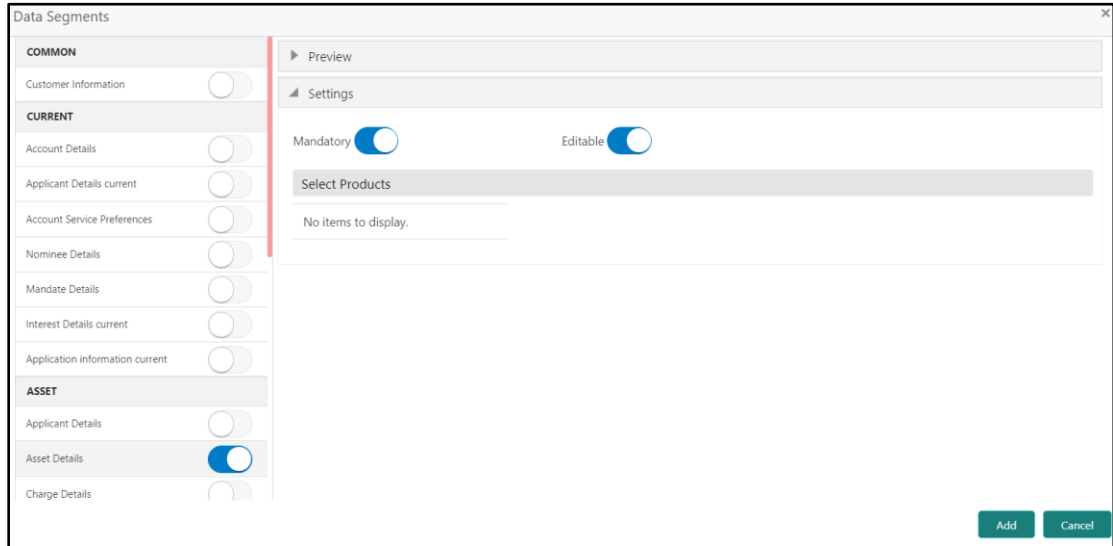
Figure 7: Create Business Process screen with stages



- Click **Data Segments** tab and then click **+** icon on the header panel.

→ The **Data Segments** screen is displayed.

Figure 8: Data Segments



- Select the required data segment or data segments for the selected stage, and specify the details in the relevant data fields. For more information on menus, refer to [Table 8: Data Segments - Field Description](#).

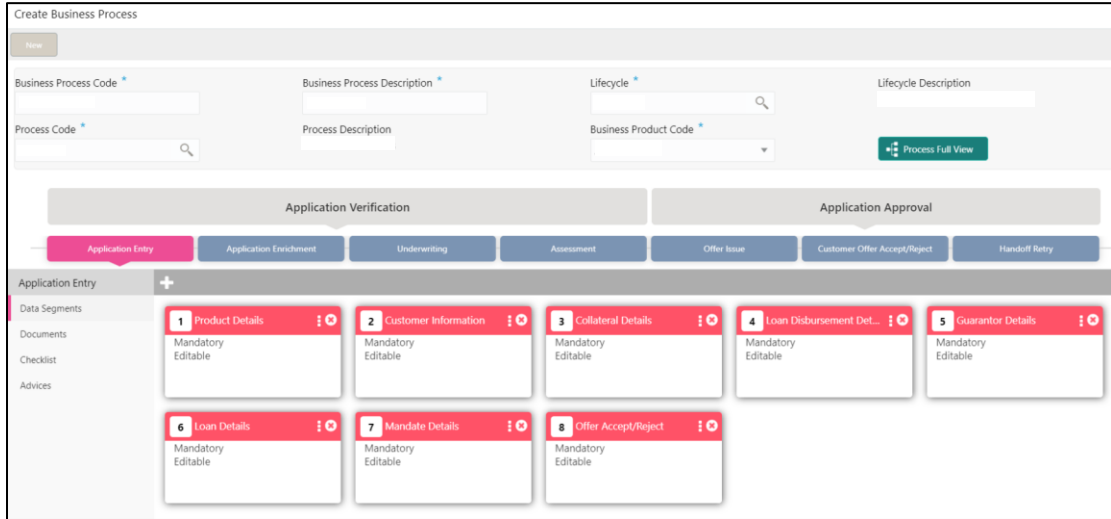
Table 8: Data Segments - Field Description

| Field | Description |
|------------------------|--|
| Preview | User can click on Preview tab to view the data segment. |
| Settings | Specify the settings. |
| Mandatory | Select if data segment is mandatory. |
| Editable | Select if data segment is editable. |
| Select Products | Select the Products for which the data segment is relevant. |

7. Click **Add**.

→ The **Business Process Definition** screen is displayed with data added segment.

Figure 9: Business Process Definition

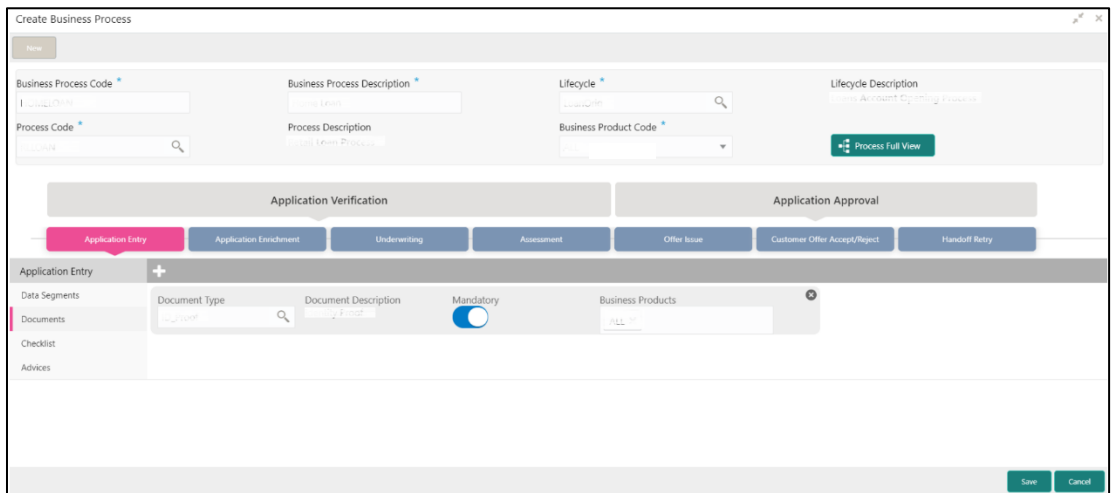


NOTE: System allows to re-sequence the data segment by dragging and dropping over the specific data segment.

8. Select the stage, and click **Document** tab to define the specific documentation requirement for different stage.

→ The **Create Business Process – Documents** segment is displayed.

Figure 10: Create Business Process – Documents



9. Specify the fields in the **Documents** segment. For more information on menus, refer to [Table 9: Create Business Process – Documents - Field Description](#).

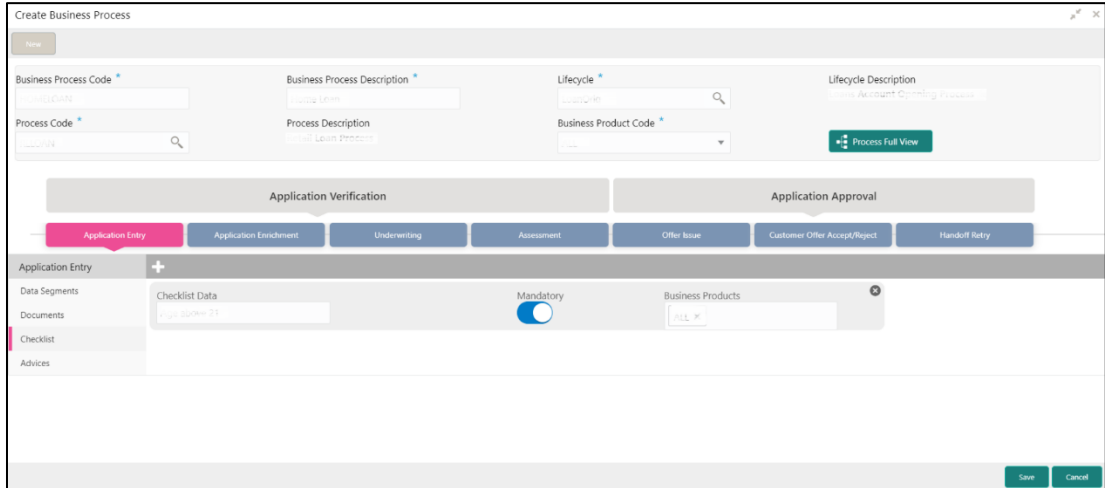
Table 9: Create Business Process – Documents - Field Description

| Field | Description |
|-----------------------------|--|
| Document Type | Search and select the document type. |
| Document Description | Displays the corresponding description of the document. |
| Mandatory | Select if the document submission for the stage is mandatory. |
| Business Products | Select the required option for the document submission requirement. Available options are: <ul style="list-style-type: none"> • Single Product • List of Products • All |
| Save | To save the captured details, click Save . |
| Cancel | Click Cancel to close the Business Process screen, it get closed without saving the data. |

10. Select the stage, and click **Checklist** tab.

→ The **Create Business Process – Checklist** segment is displayed.

Figure 11: Create Business Process – Checklist



11. Specify the fields in the **Checklist** segment. For more information on menus, refer [Table 10: Create Business Process – Checklist - Field Description](#).

Table 10: Create Business Process – Checklist - Field Description

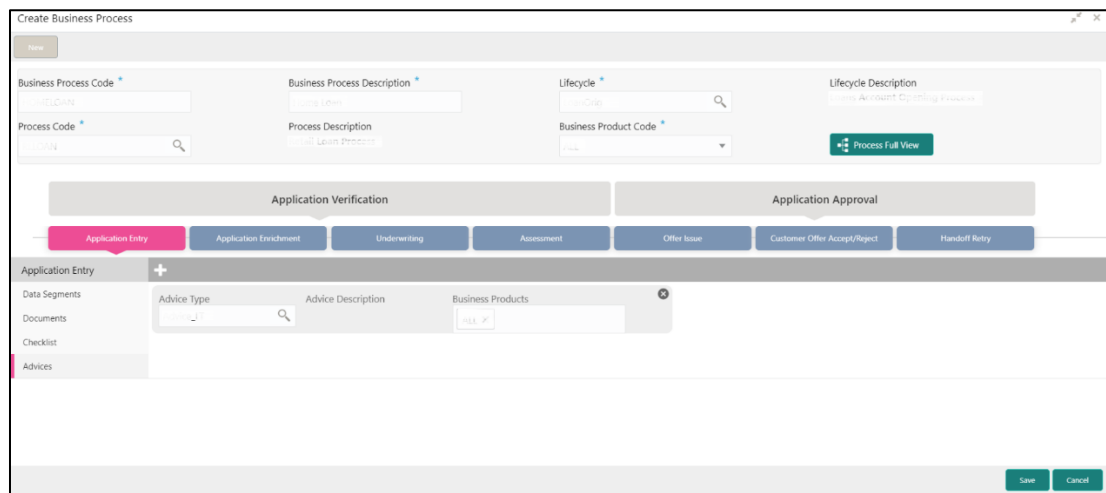
| Field | Description |
|--------------------------|---|
| Checklist Data | It is a free-text field that allows to user to enter the checklists that must be validated as part of selected stage. |
| Mandatory | Select if the document submission for the stage is mandatory. |
| Business Products | Select the required option to restrict the checklist. Available options are: <ul style="list-style-type: none"> • Single Product • List of Products • All |

| Field | Description |
|---------------|--|
| Save | Click Save to save the captured details. |
| Cancel | Click Cancel to close the Business Process screen, it get closed without saving the data. |

12. Select the stage, and click **Advices** tab.

→ The **Create Business Process – Advices** segment is displayed.

Figure 12: Create Business Process – Advices



13. Specify the fields in the **Advices** segment. For more information on menus, refer Table 11: Create Business Process – Advices - Field Description.

Table 11: Create Business Process – Advices - Field Description

| Field | Description |
|---------------------------|--|
| Advice Type | Search and select the required advice type from the displayed list of all the valid advices maintained, and that must be mapped to this stage. |
| Advice Description | Displays the corresponding description of the advice. |
| Business Products | Select the required option to restrict the advices. Available options are: <ul style="list-style-type: none"> • Single Product |

| Field | Description |
|---------------|--|
| | <ul style="list-style-type: none">• List of Products• All |
| Save | Click Save to save the captured details. |
| Cancel | Click Cancel to close the Business Process screen, it get closed without saving the data. |

14. Click **Save** to create business process.

At this point, the status of business process is un-authorized. User with supervisor access has to approve the business process. Once approved, status of the business process changes from un-authorized to authorized, and is activated for usage in the Servicing Transactions.

2.3.2 View Business Process

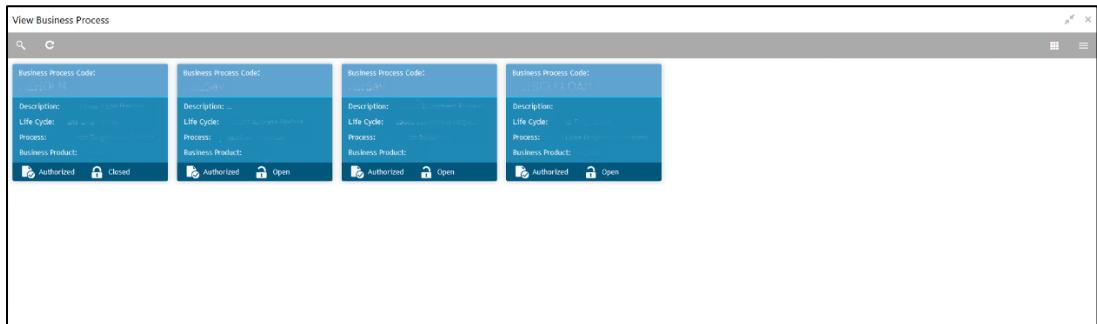
Oracle Banking Branch supports to view the business process created. The View Business Process allows the user to view all of the authorized, un-authorized and closed business process. Authorize option is also available for supervisor users for approving un-authorized business process.

To process this screen, type **View Business Process** in the Menu Item Search located at the left corner of the application toolbar and select the appropriate screen (or) do the following steps:

1. From **Home screen**, click **Servicing Configurations**. Under **Servicing Configurations**, click **Business Process**.
2. Under **Business Process**, click **View Business Product**.

→ The **View Business Process** screen is displayed.

Figure 13: View Business Process



Tiles representing the various Business Process in different state such as Open, In-Progress, Closed and in Authorized and Unauthorized status are visible in this process.

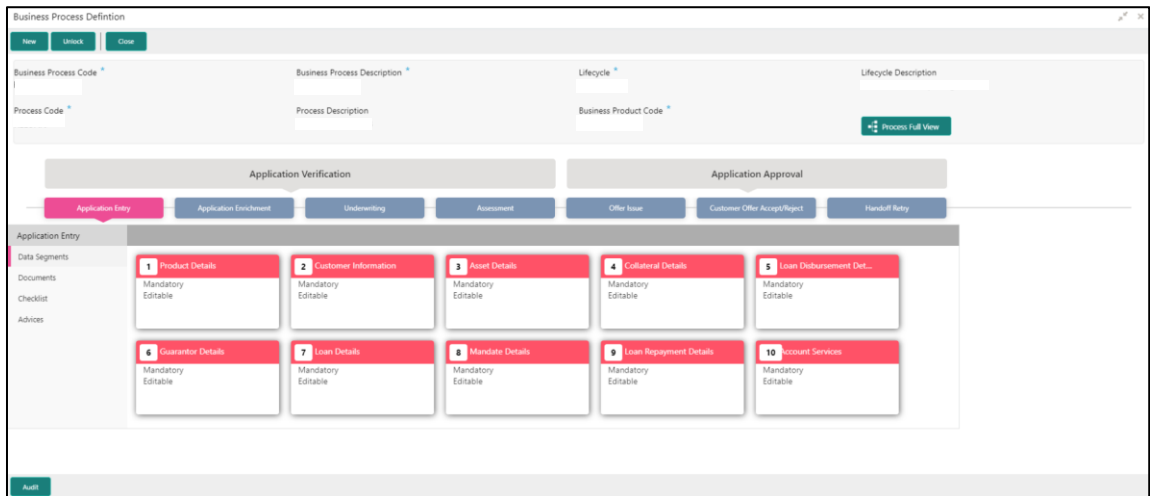
- Click on the **Business Process Tile** to select the specific business process.

Pre-condition

Only if business process is authorized.

→ The **Business Process Definition – Authorized** screen is displayed.

Figure 14: Business Process Definition - Authorized Business Process



For Authorized business process, available options are:

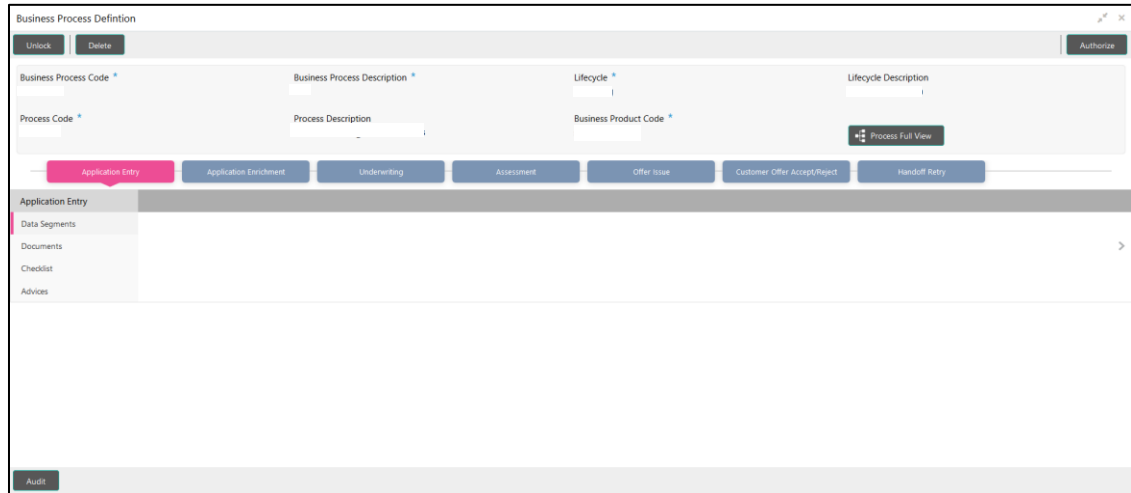
- **New** – Click this button to create new business process.
- **Unlock** – Click this button to edit the business process.
- **Close** – Click this button to permanently deactivate the Business Process. Once closed, the Business Process cannot be used for Servicing transactions.

Pre-condition

Only if business process is un-authorized.

→ The **Business Process Definition – Un-Authorized** screen is displayed.

Figure 15: Business Process Definition – Un-authorized Business Process



For un-authorized business process, available options are:

- **Unlock** - Click this button to edit the business process.
- **Delete** - Click this button to delete the business process.
- **Authorize** - User with authorization access will be able to view this button and will be able to authorize the record.

For more information on options, refer to [Table 12: View Business Process - Field Description](#).

Table 12: View Business Process - Field Description

| Field | Description |
|---------------|--|
| Unlock | As specified in Figure 14 and Figure 15 , this option is common for authorized and un-authorized business product. Click Unlock to edit the business process information in Create Business Process data segment. |

| Field | Description |
|------------------|---|
| | <p>System will not allow to edit the following fields:</p> <ul style="list-style-type: none"> • Business Process Code • Process Code • Lifecycle <p>Make the required changes in the other relevant data segment and submit the business product.</p> |
| Close | <p>Click Close to close the business processes that are no more relevant for banking product offering. User can close only authorized business processes.</p> |
| Authorize | <p>User with supervisor access will be able to authorize the un-authorized business process. Once approved, the business process status changes to Authorized.</p> |
| Delete | <p>Click Delete to delete the business processes that are un-authorized and no more required.</p> |

3 Annexure 1: Error Codes and Messages

This topic contains error codes and messages.

Table 13: Error Codes and Messages

| Error Code | Message |
|-------------------|--|
| GCS-AUTH-01 | Record Successfully Authorized |
| GCS-AUTH-02 | Valid modifications for approval were not sent. Failed to match |
| GCS-AUTH-03 | Maker cannot authorize |
| GCS-AUTH-04 | No Valid unauthroized modifications found for approval. |
| GCS-CLOS-01 | Record Already Closed |
| GCS-CLOS-02 | Record Successfully Closed |
| GCS-CLOS-03 | Unauthorized record cannot be closed, it can be deleted before first authorization |
| GCS-COM-001 | Record does not exist |
| GCS-COM-002 | Invalid version sent, operation can be performed only on latest version |
| GCS-COM-003 | Please Send Proper Modification Number |
| GCS-COM-004 | Please send maker Id in the request |
| GCS-COM-005 | Request is Null. Please Resend with Proper Values |
| GCS-COM-007 | Request Successfully Processed |
| GCS-COM-008 | Modifications should be consecutive. |
| GCS-COM-009 | Resource ID cannot be blank or "null". |
| GCS-COM-010 | You have successfully cancelled \$1. |

| Error Code | Message |
|-------------------|---|
| GCS-DEL-001 | Record deleted successfully |
| GCS-DEL-002 | Record(s) deleted successfully |
| GCS-DEL-003 | Modifications didnt match valid unauthorized modifications that can be deleted for this record |
| GCS-DEL-004 | Send all unauthorized modifications to be deleted for record that is not authorized even once. |
| GCS-DEL-005 | Only Maker of first version of record can delete modifications of record that is not once authorized. |
| GCS-DEL-006 | No valid unauthroized modifications found for deleting |
| GCS-DEL-007 | Failed to delete. Only maker of the modification(s) can delete. |
| GCS-MOD-001 | Closed Record cannot be modified |
| GCS-MOD-002 | Record Successfully Modified |
| GCS-MOD-003 | Record marked for close, cannot modify. |
| GCS-MOD-004 | Only maker of the record can modify before once auth |
| GCS-MOD-005 | Not amendable field, cannot modify |
| GCS-MOD-006 | Natural Key cannot be modified |
| GCS-MOD-007 | Only the maker can modify the pending records. |
| GCS-REOP-003 | Successfully Reopened |
| GCS-REOP-01 | Unauthorized Record cannot be Reopened |
| GCS-REOP-02 | Failed to Reopen the Record, cannot reopen Open records |
| GCS-REOP-03 | Successfully Reopened |

| Error Code | Message |
|-------------------|--|
| GCS-REOP-04 | Unauthorized record cannot be reopened, record should be closed and authorized |
| GCS-SAV-001 | Record already exists |
| GCS-SAV-002 | Record Saved Successfully. |
| GCS-SAV-003 | Congratulations!! The record is saved and validated successfully. |
| GCS-VAL-001 | Congratulations!! Your record is successfully validated. |
| SRV_BP_001 | Source stage value should be either Y/N not valid |
| SRV-BP-002 | Cannot have more than one source stage |
| SRV-BP-003 | Datasegment Code not valid |
| SRV-BP-004 | DocumentType Code not valid |
| SRV-BP-005 | LIFECYCLE not valid |
| SRV-BP-006 | Unable to \$1 Business Process as \$2 datasegment has the following dependencies \$3 in lifecycle \$4 ,which have not been mapped prior to it! |
| SRV-BP-007 | Unable to \$1 Business Process as the mandatory data segments \$2 for the \$3 lifecycle have not been mapped! |
| SRV-BP-008 | In \$1 stage of \$2 Business Process,duplicate datasegements - \$3 are not allowed |
| SRV-BP-009 | Record already exist with same Lifecycle and Business Product |
| SRV-BP-010 | At \$1 in \$2 stage of \$3 Business Process,duplicate record for - \$4 exist |

| Error Code | Message |
|-------------------|---|
| SRV-BP-011 | At \$1 in \$2 stage of \$3 Business Process,Business Product List is invalid. |
| SRV-BP-012 | Business Product Code is Invalid |
| SRV-BP-013 | Stage \$1 should have atleast one datasegment attached |
| SRV-CMN-001 | Exception Occurred while Executing Query |
| SRV-CMN-002 | Number format exception |
| SRV-CMN-003 | Server Error Occurred during API call |
| SRV-CMN-004 | Illegal State Exception |
| SRV-CMN-006 | Exception Occurred while creating Bean |
| SRV-CMN-007 | Internal server error occurred |

4 Annexure 2: Lifecycle Codes

This topic contains lifecycle codes and descriptions.

Table 14: Lifecycle Codes

| Lifecycle Code | Lifecycle Description |
|-----------------------|----------------------------------|
| CREATEINSTRUCTION | Create Standing Instruction |
| TRANSFERACCOUNT | Account Branch Transfer |
| SWEEPINNEW | Sweep In to CASA |
| SWEEPOUTNEW | Sweep Out to CASA |
| UPDNOM | Nominee Details Update |
| UPDJH | Joint Holder Create |
| UPDCRD | Update Card Status |
| TODCSR | Temporary Overdraft Limit Create |
| STOPCHEQUE | Stop Cheque Request |
| REQUESTACCOUNTSTMT | Account Statement Request |
| MODSI | Modify Si |
| CREATEAUTOTD | Auto Term Deposit |
| ASFSAV | Account Statement Frequency |
| AMTBLK | Amount Block |
| AdaSav9 | Activate Dormant account |
| ACADRR | Update Account Address |
| AscSav | Account Status Change Create |

5 Annexure 3: Process Codes

This topic contains process codes, stage codes, and descriptions.

Table 15: Process Codes

| Sequence | Process Code | Process Code Description | Stage Code | Stage Code Description |
|-----------------|---------------------|---------------------------------|----------------------|-------------------------------|
| 1 | CASAPC | CASA Application | CASAPC_INITIATION | CASA Application Entry |
| 2 | CASAPC | CASA Application | CASAPC_APPROVAL | CASA Application Approval |
| 3 | CASAPC | CASA Application | CASAPC_HANDOFF_RETRY | CASA HandOff Retry |

6 Annexure 4: Data Segment List

This topic contains the list of data segments.

Table 16: Data Segment List

| Data Segment Code | Data Segment Name |
|---|-----------------------------|
| fsgbu-ob-remo-casa-ds-tmp-overdraft-mnt | Temporary Overdraft Limit |
| fsgbu-ob-remo-casa-ds-stand-inst | Scheduled Transfer |
| fsgbu-ob-remo-casa-ds-sweep-in | Sweep In to CASA |
| fsgbu-ob-remo-casa-ds-sweep-out | Sweep Out to CASA |
| fsgbu-ob-remo-casa-ds-accbrn-trn | Account Branch Transfer |
| fsgbu-ob-remo-casa-ds-card-status-change | Card Status Change |
| fsgbu-ob-remo-casa-ds-amount-block | Amount Block |
| fsgbu-ob-remo-casa-ds-accaddr-update | Account Address Update |
| fsgbu-ob-remo-casa-ds-modify-stand-inst | Modify SI |
| fsgbu-ob-remo-casa-ds-nominee-details | Nominee Details |
| fsgbu-ob-remo-casa-ds-view-stand-inst | Modify SI View |
| fsgbu-ob-remo-casa-ds-accsttreq | Account Statement Request |
| fsgbu-ob-remo-casa-ds-jnthlderdtls-update | Joint Holder Details Update |
| fsgbu-ob-remo-casa-ds-accstntfreq-update | Account Statement Frequency |
| fsgbu-ob-remo-casa-ds-stopcheque | Stop Cheque Request |
| fsgbu-ob-remo-casa-ds-autotd | Auto TD Instruction |
| fsgbu-ob-remo-casa-ds-acct-status-change | Account Status Change |
| fsgbu-ob-remo-casa-ds-actdac | Activate Dormant Account |

7 List of Menus

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2. View Business Product - [View Business Product](#) (pg. 11)
3. Create Business Process - [Create Business Process](#) (pg. 15)
4. View Business Process - [View Business Process](#) (pg. 24)