Oracle® Banking Collections Cloud Service

Maintenance User Guide

Release 14.8.0.0.0
G30159-01
April 2025

Oracle Banking Collections Cloud Service Maintenance User Guide, Release 14.8.0.0.0

G30159-01

Contents

Preface

This user guide helps you to setup and maintain the day zero configurations using the maintenance pages of Oracle Banking Collections Cloud Service application.

Purpose

This guide is designed to help acquaint you with the Maintenance User Guide application. This guide provides answers to specific features and procedures that the user need to be aware of the module to function successfully.

Audience

This guide is intended for the users of Oracle Banking Collections Cloud Service application.

Documentation Accessibility

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these Oracle resources:

- *Oracle Banking Collections Getting Started User Guide*
- *Oracle Banking Collections Transactions User Guide*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Screenshot Disclaimer

Personal information used in the interface or documents is dummy and does not exist in the real world. It is only for reference purposes.

Acronyms and Abbreviations

The list of the acronyms and abbreviations that are used in this guide are as follows:

Table Acronyms and Abbreviations

Abbreviation	Description
DDA	Demand Deposit Accounts
ECA	External Credit Approval
EOD	End of Day
IBAN	International Bank Account Number

Basic Actions

The basic actions performed in the screens are as follows:

Table Basic Actions

Actions	Description
New	Click **New** to add a new record. The system displays a new record to specify the required data. The fields marked with asterisk are mandatory. • This button is displayed only for the records that are already created.
Save	Click **Save** to save the details entered or selected in the screen.
Unlock	Click **Unlock** to update the details of an existing record. The system displays an existing record in editable mode. • This button is displayed only for the records that are already created.
Authorize	Click **Authorize** to authorize the record created. A maker of the screen is not allowed to authorize the same. Only a checker can authorize a record. • This button is displayed only for the already created records. For more information on the process, refer Authorization Process.
Approve	Click **Approve** to approve the initiated record. • This button is displayed once the user click **Authorize**.
Audit	Click **Audit** to view the maker details, checker details of the particular record. • This button is displayed only for the records that are already created.
Close	Click **Close** to close a record. This action is available only when a record is created.
Confirm	Click **Confirm** to confirm the action performed.
Cancel	Click **Cancel** to cancel the action performed.
Compare	Click **Compare** to view the comparison through the field values of old record and the current record. • This button is displayed in the widget once the user click **Authorize**.
View	Click **View** to view the details in a particular modification stage. • This button is displayed in the widget once the user click **Authorize.**
View Difference only	Click **View Difference only** to view a comparison through the field element values of old record and the current record, which has undergone changes. • This button is displayed once the user click **Compare**.
Expand All	Click **Expand All** to expand and view all the details in the sections. • This button is displayed once the user click **Compare**.
Collapse All	Click **Collapse All** to hide the details in the sections. • This button is displayed once the user click **Compare**.
OK	Click **OK** to confirm the details in the screen.

Symbols and Icons

This guide has the following list of symbols and icons.

Table Symbols and Icons - Common

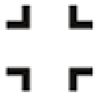
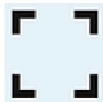
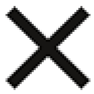
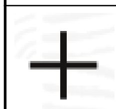
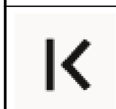
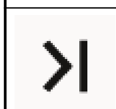
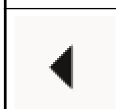
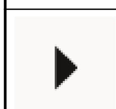
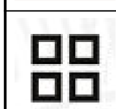
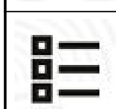
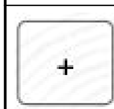
Symbol/Icon	Function
	Minimize
	Maximize
	Close
	Perform Search
	Open a list
	Add a new record
	Navigate to the first record
	Navigate to the last record
	Navigate to the previous record
	Navigate to the next record
	Grid view
	List view
	Refresh
	Click this icon to add a new row.

Table (Cont.) Symbols and Icons - Common

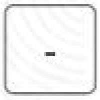
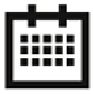
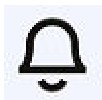
Symbol/Icon	Function
	Click this icon to delete a row, which is already added.
	Calendar
	Alerts

Table Symbols and Icons – Audit Details

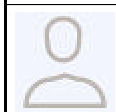
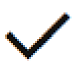
Symbol/Icon	Function
	A user
	Date and time
	Unauthorized or Closed status
	Authorized or Open status
	Rejected status

Table Symbols and Icons - Widget

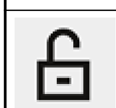
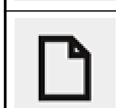
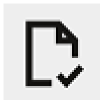
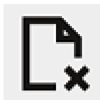
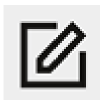
Symbol/Icon	Function
	Open status
	Unauthorized status
	Closed status

Table (Cont.) Symbols and Icons - Widget

Symbol/Icon	Function
	Authorized status
	Rejected status
	Modification Number

1 Introduction

Oracle Banking Collections Cloud Service facilitates you to setup and maintain day zero configurations required to perform the day to day transactions efficiently.

The **Maintenance** menu pages help you with the following essential configurations:

- Configure lookups to create predefined values that appear in drop down lists of various fields.
- Configure product processors for receiving delinquent account details.
- Configure seed data codes to process, map, and store the corresponding information received from the product processors.
- Configure definitions to generate auto numbers based on predefined logic.
- Configure workflows to define life cycle of tasks that are performed by the system or collectors.
- Create tasks that need to be performed by the system or collectors to collect the amount due from the customer.
- Configure action and results that are used to process details of task performed under a strategy.
- Create strategies to group tasks that are required to performed on a case.
- Create segments to group the accounts based on certain rules.
- Create and manage user groups to manage users and agencies who perform collection tasks and activities for a case.
- Configure user assignment based on which tasks are assigned to users and agencies.
- Create promise types that are used to create promises made by the customer to repay the due amount.
- Configure communication templates for different communication channels like Letter, Email or SMS.
- Configure different type on fees and charges on the account to be calculated under specific conditions.
- Onboard Agencies which will be used in assignment process.

2 Lookups

The lookups help you to configure values that appear in the drop down list of a field to which the lookup is mapped. This facilitates you to create predefined values for drop down lists as per your requirement and use it for processing information in the system.

A lookup can be:

- User-Defined: These are the lookups that are created manually using the **Create Lookup** page.
- System-Defined: These are the lookups that are created by the system at the time of day zero set-up. You can modify such lookups, if required.

You can create and manage lookups using the following pages:

- Create Lookup
- View Lookup

2.1 Create Lookup

The **Create Lookup** page facilitates you to create a lookup. You can create lookups for a field to display predefined values for a drop down list. These values appear in the drop down list of all the fields that are mapped to the lookup.

Table 2-1 Field Description: Create Lookup

Field Name	Description
Basic Information	This section is used to provide the basic information of the lookup.
Type	Indicates the name of the lookup.
Description	Indicates the description of the purpose of the lookup type.
System Defined	Displays whether the lookup is system defined. The lookups created using this page are called user-defined lookups since these are created manually by the user. Therefore, the value displayed in this field is always **No.**
Lookup Codes	This section is used to provide lookup codes for the lookup type.
Code	Indicates the unique identification code for the lookup type.
Description	Indicates the description of the lookup code. The description is the value that appears in the drop down list for the field mapped with the lookup.
Sort	Indicates the sequence number at which the code description should appear in the drop down list. For example, if you enter sort as 2 for a lookup code, then the particular description for the lookup code will appear second in the drop down list of the field.
System Defined	Displays whether the lookup code is system defined. The lookups created using this page are called user-defined lookups since these are created manually by the user. Therefore, the value displayed in this field is always **No.**

Table 2-1 (Cont.) Field Description: Create Lookup

Field Name	Description
Sub Code 1	Indicates the value used for processing logic. This is used to handle small use case or filter to show value or perform an action. You can specify multiple sub codes using comma separator.
Sub Code 2	Indicates the value used for processing logic. This is used to handle small use case or filter to show value or perform an action. You can specify multiple sub codes using comma separator.
Active	Toggle to indicate whether lookup code is active.

This section consists of the following topic:

- Creating a Lookup

2.1.1 Creating a Lookup

For creating a lookup, you need to specify details, such as the lookup type, lookup code, and sub codes.

To create a lookup:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Lookups** and then click **Create Lookup.**

   The **Create Lookup** page appears.
3. In the **Type** field, enter the type of lookup.
4. In the **Description** field, enter the description of the lookup.
5. Click **Save.**

Once the lookup is created, you can view the same using the **View Lookup** page. Upon creation, the authorization status of the lookup is **Unauthorized** and the record status is **Open.** After a lookup is created, it must be authorized to be effective in the system.

2.2 View Lookup

The **View Lookup** page facilitates you to view the list of lookups created in the system and perform various actions on a lookup.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a lookup.

You can perform the following actions:

- Modify details of a lookup. However, only the maker can modify a lookup before the first authorization. Once the first authorization is done, the lookup can be modified by any other user.
  A system-defined lookup consists of system-defined lookup codes. When you modify a system-defined lookup, you can also add lookup codes manually. But you cannot delete or modify the system-defined lookup codes. You can only delete the user-defined lookup codes that you add manually for a system-defined lookup.

- Authorize the lookups that are created, modified, closed, or reopened.
- Close an authorized lookup that you don’t want to use.
- Reopen a closed lookup.
- Delete a lookup that is not yet authorized upon creation. Only the maker of the lookup, can delete it. Once a lookup is authorized, you cannot delete it.
- View detailed information of a lookup in read-only mode.

Table 2-2 Field Description: View Lookups - Tile

Field Name	Description
Lookup Type	Displays the lookup type.
Lookup Description	Displays the description of the lookup.
System Defined	Displays whether the lookup is system defined. The possible options are: • **Yes:** This option is displayed for the system-defined lookups. • **No:** This option is displayed for the user-defined lookups.
<Authorization Status>	Displays the authorization status of the lookup. The possible options are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click . Using this section, you can quickly search for lookups based on the specified search criteria.

Table 2-3 Field Description: View Lookup - Search

Field Name	Description
Type	Indicates the lookup type.
Description	Indicates the description of the lookup.
Authorization Status	Indicates the authorization status of the lookup. The options are: • **Authorized:** Select this option if you want to search for a lookup with Authorized status. • **Unauthorized:** Select this option if you want to search for a lookup with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a lookup with Open status. • **Closed:** Select this option if you want to search for a lookup with Closed status.
System Defined	Indicates whether lookup is system-defined. The options are: • **Yes:** Select this option if you want to search for a lookup that is system-defined. • **No:** Select this option if you want to search for a lookup that is user-defined.

This section consists of the following topic:

- Viewing List of Lookups

2.2.1 Viewing List of Lookups

You can view the list of lookups created in the system and search for a particular lookup.

To view the list of lookups:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Lookups** and then click **View Lookup.**
3. View the list of lookups created in the system.
4. If you want to search for a particular lookup:
   a. Click .
   b. Enter the search criteria and click **Search.**

> **Note:**
>
> If you want to create a lookup from this page, click +. For more information, see Create Lookup.
> For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

3

Product Processor

A product processor helps to receive details of the delinquent accounts in Oracle Banking Collections. System receives various information of delinquent accounts from the product processor. For example, it helps you to receive details regarding the account numbers, customer names, and assets associated with the default account.

The information received from the product processor is then used to track and perform various collection activities to recover the amount due from the customers. While using the information received through the product processor, system checks that the business date falls between the effective date and expiry date defined for the product processor. It also checks that the product processor is authorized and is in open status. If a product processor is modified and a page is using the same product processor, then system validates information with the updated product processor that is in authorized and open status.

You can create and manage product processors using the following pages:

- Create Product Processor
- View Product Processor

3.1 Create Product Processor

The **Create Product Processor** page facilitates you to create a product processor through which the details of the default accounts are received. You can create one or more product processors depending on the number of host systems from where the information is to be received.

While creating a product processor, you can choose to integrate product processor with the decision service or bureau integration systems. You can also choose whether system should create the portfolio company or branch using the core branch definition.

Table 3-1 Field Description: Create Product Processor

Field Name	Description
Basic Information	This section is used to provide the basic information of the product processor.
Code	Indicates the unique identification code of the product processor that you want to create for the host system.
Description	Indicates the description of the product processor. This is the name of the source application or product name from where the default account details are received in Oracle Banking Collections application.
Group Basis	Indicates the option based on which system should allocate the accounts received from the product processor to the collectors. The options are: • **Customer:** Select this option if you want the accounts received to be allocated based on customer details. • **Account:** Select this option if you want the accounts received to be allocated based on account details.

Table 3-1 (Cont.) Field Description: Create Product Processor

Field Name	Description
Effective Date	Indicates the date from when the application should accept information received from the product processor. **Note:** The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
Expiry Date	Indicates the date till when the application should accept information received from the product processor. **Note:** The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
Populate Portfolio Company/Branch	Toggle to indicate whether system should create portfolio company or branch using the Core Branch definition. **Note:** You cannot edit this field once the product processor is created.
Bureau Integration	Toggle to indicate whether product processor is integrated with bureau integration system.
Decision Service	Toggle to indicate whether product processor is integrated with decision service system.
Additional Information	This section is used to provide additional information of the product processor.
Attribute Type	Indicates the attribute type. The options are: • **Module** • **Type** • **Sub Type**
Attribute Value	Indicates the attribute value. **Note:** The options in this list appear based on the option selected in **Attribute Type** field.

This section consists of the following topic:

- Creating a Product Processor

3.1.1 Creating a Product Processor

For creating a product processor, you need to specify details, such as product processor code, description, and the date from when it is effective.

To create a product processor:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Product Processor** and then click **Create Product Processor.**

   The **Create Product Processor** page appears.
3. In the **Code** field, enter a unique identification code for the product processor.
4. In the **Description** field, enter a description of the product processor.
5. From the **Group Basis** list, select the option based on which the application should segment the accounts received from the product processor.
6. In the **Effective Date** field, select the date from when the information received from the product processor is effective in the system.

7. If you want the application to create portfolio company or branch using the Core Branch Definition, enable the **Populate Portfolio Company/Branch** toggle switch.

   You cannot edit this field once the product processor is created. If this switch is not enabled, system automatically creates the portfolio company or branch.

8. Click **Save.**

Once the product processor is created, you can view the same using the **View Product Processor** page. Upon creation, the authorization status of the product processor is **Unauthorized** and the record status is **Open.** After a product processor is created, it must be authorized to be effective in the system.

3.2 View Product Processor

The **View Product Processor** page facilitates you to view the list of product processors created in the system and perform various actions on a product processor.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a product processor.

You can perform the following actions:

- Modify details of a product processor. However, only the maker can modify a product processor before the first authorization. Once the first authorization is done, the product processor can be modified by any other user.
- Authorize the product processors that are created, modified, closed, or reopened.
- Close an authorized product processor that you don't want to use.
- Reopen a closed product processor.
- Delete a product processor that is not yet authorized upon creation. Only the maker of the product processor, can delete it. Once a product processor is authorized, you cannot delete it.
- View detailed information of a product processor in read-only mode.

Table 3-2 Field Description: View Product Processor - Tile

Field Name	Description
Processor Code	Displays the product processor code.
Processor Description	Displays the description of the product processor.
Group Basis	Displays the option based on which system segments the accounts received from the product processor. The possible options are: • **Customer** • **Account**
Effective Date	Displays the date from when the information received through the product processor in the system is effective.
<Authorization Status>	Displays the authorization status of the product processor. The possible values are: • **Unauthorized** • **Authorized**

Table 3-2 (Cont.) Field Description: View Product Processor - Tile

Field Name	Description
<Record Status>	Displays the status of the record. The possible values are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for product processors based on the specified search criteria.

Table 3-3 Field Description: View Product Processor - Search

Field Name	Description
Processor Code	Indicates the product processor code.
Processor Description	Indicates the description of the product processor.
Group Basis	Indicates the option based on which system groups the accounts received from the product processor. The options are: • **Customer:** Select this option if you want to search for product processors with group basis as Customer. • **Accounts:** Select this option if you want to search for product processors with group basis as Account.
Authorization Status	Indicates the authorization status of the product processor. The options are: • **Authorized:** Select this option if you want to search for a product processor with Authorized status. • **Unauthorized:** Select this option if you want to search for a product processor with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a product processor with Open status. • **Closed:** Select this option if you want to search for a product processor with Closed status.

This section consists of the following topic:

- Viewing List of Product Processors

3.2.1 Viewing List of Product Processors

You can view the list of product processors created in the system and search for a particular product processor.

To view the list of product processors:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Product Processor** and then click **View Product Processor.**
3. View the list of product processors created in the system.
4. If you want to search for a particular product processor:

a. Click 🔍.
b. Enter the search criteria and click **Search.**

Note:

If you want to create a product processor from this page, click +. For more information, see Create Product Processor.
For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

4 Auto Number Generation

A definition is the logic that the system uses to generate numbers automatically. This helps in generating auto numbers based on a predefined logic instead of any random numbers that the system may generate.

You can create and manage definitions for auto number generation using the following pages:

- Create Definition
- View Definition

4.1 Create Definition

The **Create Definition** page facilitates you to create a definition using which system generates the numbers automatically for different entity types. While creating a definition, you can specify various parameters based on which the system should generate a number for an entity type.

You can create only one definition for an entity type, product processor, and branch combination. This means when a definition is created for generating auto numbers, all the numbers for an entity type of the accounts received from the specified product processor and branch, are generated based on the definition created for the same.

You can create definition for generation of auto numbers for entity type - Case Number.

Table 4-1 Field Description: Create Definition

Field Name	Description
Product Processor	Indicates the product processor. The auto numbers are generated for the accounts received from the selected product processor.
Branch	Indicates the branch name. The auto numbers are generated for the accounts of the selected branch.
Entity Type	Indicates the entity type for which the auto number should be generated using the definition. The option is **Case.** By default, the option selected is **Case.** The auto numbers are generated for the selected entity type for the accounts received from the specified product processor for the selected branch. The generated auto number is displayed or available in a list for selection for entity type fields wherever it appears in the system.
User Sequence # Reset Frequency	Indicates the frequency at which the system should reset the auto number generation logic for an entity type. The options are: • **Annual** • **None** • **Monthly** • **Weekly** • **Daily** • **Semi-Annual** • **Quarterly**

Table 4-1 (Cont.) Field Description: Create Definition

Field Name	Description
Max Length	Indicates the maximum length of the number that is generated.
Length	Toggle to indicate whether system should generate number with variable or fixed length. If **Variable** is selected, system generates number that is of variable length but up to the maximum length specified in the **Max Length** field. If **Fixed** is selected, system generates number equal to the maximum length specified in the **Max Length** field.
Add Check Digit	Toggle to indicate whether system should add a check digit at the end of the auto number generated for the selected entity type. **Note:** If this toggle is enabled, system checks that length of all the units and check digit together is not greater than the maximum length specified in the **Max Length** field.
<Unit Details>	This section is used to specify what the number should constitute and the sequence of the same in the auto number to be generated.
Sequence	Indicates the sequence of the unit in the auto number generation logic. The value of the unit appears in the generated auto number as per the sequence number. By default, when you add a row it displays the sequence number. If you add multiple rows, system automatically provides a sequence number depending on the number of rows added in the table. You can modify the sequence number based on how you want the values of the unit should appear in the auto number to be generated. The sequence number must be unique for each unit.
Units	Indicates the unit with which the system should generate the number. The options are: • **Record Creation Year (YYYY)** • **Record Creation (DD)** • **Record Creation Year/Month (YYYYMM)** • **Random Number > Length** • **Record Creation Year (YY)** • **System Sequence Number > Length** • **User Sequence Number > Length** • **Record Creation Month (MM)** • **Constant** For example, if you select **Constant** and specify AN as the value in the **Value** field with sequence as 1 for entity type as **Case.** In this scenario, auto number generated for all the case numbers will start with AN as a constant value. **Note:** This list displays options based on the selected entity type. By default, **Constant** is selected. You can add one or more units for generating auto number for an entity type. However, ensure that the total of values specified for each active unit is less than or equal to the maximum length specified in **Max Length** field. It is mandatory to add and enable the **System Sequence Number > Length** unit. And it must be numbered last in the sequence if more than one units are added.

Table 4-1 (Cont.) Field Description: Create Definition

Field Name	Description
Value	Indicates or displays the length of the unit. For the following options in the **Unit** field, it displays the values by default and you cannot edit the same. • **Record Creation Year (YYYY)** • **Record Creation (DD)** • **Record Creation Year/Month (YYYYMM)** • **Record Creation Year (YY)** • **Record Creation Month (MM)** **Note:** Ensure that the total of the values specified for all the active units is less than or equal to the maximum length specified in the **Max Length** field.
Enabled	Toggle to indicate whether the unit is active. **Note:** System uses only the active units for generating auto numbers.

This section consists of the following topic:

- Creating a Definition

4.1.1 Creating a Definition

For creating a definition, you need to specify details, such as product processor, branch, and entity type.

To create a definition:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Auto Number Generation** and then click **Create Definition.**

   The **Create Definition** page appears.
3. From the **Product Processor** list, select the product processor for which you want to generate the auto numbers for the entity type.
4. From the **Branch** list, select the branch for which you want generate the auto numbers for the entity type.
5. From the **Entity Type** list, select the entity type for which you want generate the auto numbers for the accounts received from the product processor for the selected branch.
6. In the **Max Length** field, enter the maximum length of the auto number to be generated.
7. In the **Length** field, toggle the switch as required to indicate whether the system should generate number with variable or fixed length.
8. In the **Add Check Digit** field, toggle the switch as required to indicate whether the system should add a check digit at the end of the auto number to be generated for the selected entity type.
9. Click .

   A row is added in the unit details table. You can add one or more rows to add the units based on which the system should generate the auto number.
10. From the **Units** list, select the **System Sequence Number > Length** option.

It is mandatory that the **System Sequence Number > Length** unit is enabled and must be numbered last in the sequence order if more than one units are added.

11. In the **Value** field, enter a value for the option selected.
12. If you add more than one units, edit the default sequence number in the **Sequence** field for the units added depending on the order in which you want the value of the units to appear in the auto number to be generated.
13. In the **Enabled** field, enable the toggle switch of the units to be used for auto number generation.
14. Click **Validate Sequence.**

    A message appears showing the sample auto number generated based on the selected active units. It also indicates whether the number generated is valid.
15. Click **Save.**

Once the definition is created, you can view the same using the **View Definition** page. Upon creation, the authorization status of the definition is **Unauthorized** and the record status is **Open.** After a definition is created, it must be authorized to be effective in the system.

4.2 View Definition

The **View Definition** page facilitates you to view the list of definitions created in the system and perform various actions on a definition.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a definition.

You can perform the following actions:

- Modify details of a definition. However, only the maker can modify a definition before the first authorization. Once the first authorization is done, the definition can be modified by any other user.
- Authorize the product processors that are created, modified, closed, or reopened.
- Close an authorized definition that you don't want to use.
- Reopen a closed definition.
- Delete a definition that is not yet authorized upon creation. Only the maker of the definition, can delete it. Once a definition is authorized, you cannot delete it.
- View detailed information of a definition in read-only mode.

Table 4-2 Field Description: View Definition - Tile

Field Name	Description
Entity Type	Displays the entity type.
Product Processor	Displays the product processor code.
Branch	Displays the name of the branch.
Sequence Reset	Displays the frequency of reset for auto number generation logic for an entity type.
<Authorization Status>	Displays the authorization status of the definition. The possible values are: • **Unauthorized** • **Authorized**

Table 4-2 (Cont.) Field Description: View Definition - Tile

Field Name	Description
<Record Status>	Displays the status of the record. The possible values are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for definitions based on the specified search criteria.

Table 4-3 Field Description: View Definition - Search

Field Name	Description
Product Processor	Indicates the product processor code.
Entity Type	Indicates the entity type. The options are: • **Case** • **Strategy** • **Task** • **Segment**
Branch	Indicates the name of the branch.
Authorization Status	Indicates the authorization status of the definition. The options are: • **Authorized:** Select this option if you want to search for a definition with Authorized status. • **Unauthorized:** Select this option if you want to search for a definition with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a definition in Open status. • **Closed:** Select this option if you want to search for a definition in Closed status.

This section consists of the following topic:

- Viewing List of Definitions

4.2.1 Viewing List of Definitions

You can view the list of definitions created in the system and search for a particular definition.

To view the list of definitions:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Auto Number Generation** and then click **View Definition.**
3. View the list of definitions.
4. If you want to search for a particular definition:
   a. Click 🔍.

b. Enter the search criteria and click **Search.**

> **Note:**
>
> If you want to create a definition from this page, click +. For more information, see Create Definition.
> For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

5 Workflow

A workflow is the predefined life cycle of a task that is performed by the system or a user. It consists of the statuses through which a task moves based on certain predefined rules and conditions. Workflows are created for various task types that are created using the **Create Task** page.

You can create and manage workflows for tasks using the following pages:

- Create Workflow
- View Workflow

5.1 Create Workflow

The **Create Workflow** page facilitates you to create a workflow for a task.

Table 5-1 Field Description: Create Workflow

Field Name	Description
Basic Details	This section is used to provide basic information of the workflow.
Code	Indicates the unique identification code of the workflow.
Description	Indicates the description of the workflow.
Status Details	This section is used to provide the status transition details of the task. **Note:** If you click ▶ corresponding to a row, a section appears using which you can configure rules for the status transition record. For more information on how to configure rules, see *Oracle Banking Common Core User Guide.*
S.No.	Displays the serial number of the status transition record.
Current Status	Indicates the current workflow status of the task. **Note:** The current status and next status cannot be same.
Next Status	Indicates the next workflow status to which the task should move. **Note:** The current status and next status cannot be same.
Type	Indicates how the status transition should happen. The options are: • **Manual:** Select this option if you want the status transition to be done manually by the user. • **System:** Select this option if you want the status transition to be done by the system. **Note:** The status transition of type as **System** can also be done manually by the collector.
Active	Toggle to indicate whether the status transition is active.
Linked Tasks	Displays the list of open tasks linked to the workflow. **Note:** This section appears if you click **Linked Tasks,** which is displayed only after you save the details. However, the open tasks details appear only after the tasks are created using **Create Task** page in which workflow is mapped to the task.

This section consists of the following topic:

- Creating a Workflow

5.1.1 Creating a Workflow

For creating a workflow, you need to specify details, such as workflow code, description, and current and next status.

To create a workflow:

Before creating the workflow, you must create the statuses through which a task moves in the workflow.

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Workflow** and then click **Create Workflow.**

   The **Create Workflow** page appears.
3. In the **Code** field, enter a unique identification code for the workflow.
4. In the **Description** field, enter a description of the workflow.
5. In the **Status Details** section, click +.
6. From the **Current Status** list, select the current status of the task in the workflow.
7. From the **Next Status** list, select the next status of the task in the workflow.
8. From the **Type** list, select the option for transition of status.
9. Click ▸ corresponding to the required row.
10. Configure rules for the particular status transition record.
11. Click **Save.**

Once the workflow is created, you can view the same using the **View Workflow** page. Upon creation, the authorization status of the workflow is **Unauthorized** and the record status is **Open.** After a workflow is created, it must be authorized to be effective in the system. On authorization, the workflow is visible in the **Create Task** page from where you can map the task with the required workflow. A task moves through various statuses based on the workflow mapped to it.

5.2 View Workflow

The **View Workflow** page facilitates you to view the list of workflows created in the system and perform various actions on a workflow.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a workflow.

You can perform the following actions:

- Modify details of a workflow. However, only the maker can modify a workflow before the first authorization. Once the first authorization is done, the workflow can be modified by any other user.
- Authorize the workflows that are created, modified, closed, or reopened.
- Close an authorized workflow that you don’t want to use.
- Reopen a closed workflow.

- Delete a workflow that is not yet authorized upon creation. Only the maker of the workflow, can delete it. Once a workflow is authorized, you cannot delete it.
- View detailed information of a workflow in read-only mode. You can view the list of open tasks linked to the workflow. However, the open tasks details appear only after the tasks are created using Create Task page in which the workflow is mapped to the task.

Table 5-2 Field Description: View Workflow - Tile

Field Name	Description
Workflow Code	Displays the workflow code.
Workflow Description	Displays the description of the workflow.
Authorization Status	Displays the authorization status of the workflow. The possible options are: • **Unauthorized** • **Authorized**
Record Status	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for workflows based on the specified search criteria.

Table 5-3 Field Description: View Workflow - Search

Field Name	Description
Workflow Code	Indicates the workflow code.
Workflow Description	Indicates the workflow description.
Authorization Status	Indicates the authorization status of the workflow. The options are: • **Authorized:** Select this option if you want to search for a workflow with Authorized status. • **Unauthorized:** Select this option if you want to search for a workflow with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a workflow in Open status. • **Closed:** Select this option if you want to search for a workflow in Closed status.

This section consists of the following topic:

- Viewing List of Workflows

5.2.1 Viewing List of Workflows

You can view the list of workflows created in the system and search for a particular workflow.

To view the list of workflows:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Workflow** and then click **View Workflow.**

3. View the list of workflows created in the system.
4. If you want to search for a particular workflow:
   a. Click .
   b. Enter the search criteria and click **Search.**

> **Note:**
>
> If you want to create a workflow from this page, click . For more information, see Create Workflow.
> For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

6
Task

A task is an activity that the user or system performs to collect the amount due from the customer. For example, the collector sends an email to the customer or calls the customer over mobile.

The tasks are either executed automatically by the system, or the tasks need to be performed manually by the collector. A task has a predefined life cycle in which it goes through different statuses. This lifecycle is called the task workflow that is created using the **Create Workflow** page. For more information on workflow, see Workflow.

You can create and manage tasks using the following pages:

- Create Task
- View Task

6.1 Create Task

The **Create Task** page facilitates you to create a task. You can create a task for performing various actions on an account for collection of amount due from the customer. You can also provide the workflow for the task that you want to create.

Table 6-1 Field Description: Create Task

Field Name	Description
Task Type	Indicates the task type. The options are: • **Customer Call** • **Letter** • **Email** • **Data Capture**
Task Code	Indicates the unique identification code of the task type.
Task Description	Indicates the description of the task.
Workflow	Indicates the workflow of the task.
User Defined Field	Indicates the user defined field of the task. This field will only appear when task type is selected as Data Capture.

This topic contains the following sub-topics:

- Creating a Task

6.1.1 Creating a Task

For creating a task, you need to specify details, such as the task type, task code, and task description.

To create a task:

Before creating a task, ensure that the workflow for the task is created. For more information, see Workflow.

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Task** and then click **Create Task.**

   The **Create Task** page appears.
3. From the **Task Type** list, select the type of task that you want to create.
4. In the **Task Code** field, enter a unique identification code for the task.
5. In the **Task Description** field, enter a description for the task.
6. From the **Workflow** list, select the workflow of the task type.
7. From the **User Defined Field** list, select the user defined field of the task type.

   This list is displayed only if the **Task Type** selected is 'User Defined Field'.
8. Click **Save.**

Once the task is created, you can view the same using the **View Task** page. Upon creation, the authorization status of the task is **Unauthorized** and the record status is **Open.** After a task is created, it must be authorized to be effective in the system.

6.2 View Task

The **View Task** page facilitates you to view the list of tasks created in the system and perform various actions on a task.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a task.

You can perform the following actions:

- Modify details of a task. However, only the maker can modify a task before the first authorization. Once the first authorization is done, the task can be modified by any other user.
- Authorize the tasks that are created, modified, closed, or reopened.
- Close an authorized task that you don’t want to use.
- Reopen a closed task.
- Delete a task that is not yet authorized upon creation. Only the maker of the task, can delete it. Once a task is authorized, you cannot delete it.
- View detailed information of a task in read-only mode.

Table 6-2 Field Description: View Task - Tile

Field Name	Description
Task Code	Displays the task code.
Task Description	Displays the description of the task.
Type	Displays the task type.
Workflow	Displays the task workflow.
User Defined Field	Displays the user defined field.

Table 6-2 (Cont.) Field Description: View Task - Tile

Field Name	Description
<Authorization Status>	Displays the authorization status of the task. The possible options are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for tasks based on the specified search criteria.

Table 6-3 Field Description: Task - Search

Field Name	Description
Task Type	Indicates the task type. The options are: • **Customer Call** • **Letter** • **Email** • **Data Capture**
Task Code	Indicates the task code.
Task Description	Indicates the description of the task.
Authorization Status	Indicates the authorization status of the task. The options are: • **Authorized:** Select this option if you want to search for a task with Authorized status. • **Unauthorized:** Select this option if you want to search for a task with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a task in Open status. • **Closed:** Select this option if you want to search for a task in Closed status.

This topic contains the following sub-topics:

- Viewing List of Tasks

6.2.1 Viewing List of Tasks

You can view the list of tasks created in the system and search for a particular task.

To view the list of tasks:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Task** and then click **View Task.**
3. View the list of tasks.
4. If you want to search for a particular task:

a. Click .
b. Enter the search criteria and click **Search.**

> **Note:**
>
> If you want to create a task from this page, click . For more information, see Create Task.
> For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

7 Call Action

You can configure the action types, results, and collection statuses that are used while maintaining and processing the details of the tasks that are performed under a strategy.

You can create and manage call actions using the following pages:

- Create Call Action
- View Call Action

7.1 Create Call Action

The **Create Call Action** page facilitates you to create a call action. You can configure actions and its results for the follow-up calls that are made by collector to the customer.

You can add multiple results for an action. However, each action and result combination must be unique. You can also configure multiple collection statuses for a combination of action and result.

Table 7-1 Field Description: Create Call Action

Field Name	Description
Basic Details	This section is used to provide basic information of the call action.
Code	Indicates the unique identification code of the call action.
Description	Indicates the description of the call action.
Call Action Details	This section is used to specify details of the actions.
S. No.	Displays the serial number of the record.
Action	Indicates the action type. **Note:** You can add multiple actions. However, each action and result combination must be unique.
Call Type	Indicates the call type.
Active	Toggle to indicate whether the call action record is active. **Note:** Only the active call actions are displayed in transaction pages for call action fields.
Result Details	This section is displayed if you click ▶ corresponding to a row in the **Call Action Details** table. In this section, you can specify details of the results that you want to configure for a particular action. **Note:** You must configure at least one result for an action.
Result	Indicates the result for the action type. **Note:** You can add multiple results for an action. However, each action and result combination must be unique.
Follow-up Days	Indicates the number of days after which the follow-up should be done for the action and result combination.
Right Party Contacted	Indicates whether right party contact is enabled for action and result combination.
Status	Click **Manage** to configure the collection statuses for the action and result combination.

Table 7-1 (Cont.) Field Description: Create Call Action

Field Name	Description
Active	Toggle to indicate whether the result is active. **Note:** Only the active results are displayed in transaction pages for call action fields.
Status Details	This section is displayed if you click **Manage** in the **Status** field of **Result Details** section. It is used to specify collection status details for an action and result combination. **Note:** You can add multiple collection statuses for an action and result combination.
Collection Status	Indicates the collection status of the action and result combination.
Action	Indicates whether the collection status is open or closed for the action and result combination.

This section consists of the following topic:

- Creating Call Action

7.1.1 Creating Call Action

For creating a call action, you need to specify details, such as code, description, actions, and results.

To create a call action:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Call Action** and then click **Create Call Action.**

   The **Create Call Action** page appears.
3. In the **Code** field, enter a unique identification code for the call action.
4. In the **Description** field, enter a description of the call action.
5. In the **Call Action Details** section, select action from the **Action** list.
6. From the **Call Type** list, select the call type.
7. In the **Active** field, toggle to indicate whether the action is enabled.
8. Click ▶ corresponding to the required action for which you want to add results and enter details in the **Result Details** section.
   a. From the **Result** list, select result for the action.
   b. In the **Right Party Contacted** field, toggle to indicate whether right party is contact is enabled.
   c. In the **Status** field, click **Manage** and enter collection status details in the **Status Details** section.
   d. In the **Active** field, toggle to indicate whether result is active.
9. Click **Save.**

7.2 View Call Action

The **View Call Action** page facilitates you to view the list of call actions created in the system and perform various actions on a call action.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a call action.

You can perform the following actions:

- Modify details of a call action. However, only the maker can modify a call action before the first authorization. Once the first authorization is done, the call action can be modified by any other user.
- Authorize the call action that are created, modified, closed, or reopened.
- Close an authorized call action that you don't want to use.
- Reopen a closed call action.
- Delete a call action that is not yet authorized upon creation. Only the maker of the call action, can delete it. Once a call action is authorized, you cannot delete it.
- View detailed information of a call action in read-only mode.

Table 7-2 Field Description: View Call Action - Tile

Field Name	Description
Action Code	Displays the call action code
Action Description	Displays the description of the call action.
<Authorization Status>	Displays the authorization status of the call action. The possible options are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click . Using this section, you can quickly search for call actions based on the specified search criteria.

Table 7-3 Field Description: View Call Action - Search

Field Name	Description
Code	Indicates the call action code.
Description	Indicates the description of the call action.
Authorization Status	Indicates the authorization status of the call action. The options are: • **Authorized:** Select this option if you want to search for a call action with Authorized status. • **Unauthorized:** Select this option if you want to search for a call action with Unauthorized status.

Table 7-3 (Cont.) Field Description: View Call Action - Search

Field Name	Description
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a call action with Open status. • **Closed:** Select this option if you want to search for a call action with Closed status.

This section consists of the following topic:

- Viewing List of Call Actions

7.2.1 Viewing List of Call Actions

You can view the list of call actions created in the system and search for a particular call action.

To view the list of call actions:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Call Action** and then click **View Call Action.**
3. View the list of call actions created in the system.
4. If you want to search for a particular call action:
   a. Click 🔍.
   b. Enter the search criteria and click **Search.**

> **Note:**
>
> If you want to create a call action from this page, click +. For more information, see Create Call Action.
> For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

8
Strategy

A strategy is a group of tasks to be performed on a case for collection of unpaid dues from the customer of a delinquent account. The tasks are performed either by the system or manually by the collectors. These tasks are grouped together under various strategies.

You can create and manage strategies using the following pages:

- Create Strategy
- View Strategy

8.1 Create Strategy

The **Create Strategy** page facilitates you to create a strategy. While creating a strategy, you can associate multiple tasks to the strategy.

Table 8-1 Field Description: Create Strategy

Field Name	Description
Basic Details	This section is used to provide basic information of the strategy.
Code	Indicates the unique identification code of the strategy.
Description	Indicates the description of the strategy.
Effective Date	Indicates the date from when the strategy is effective in the system. **Note:** The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
Expiry Date	Indicates the date till when the strategy is effective in the system. **Note:** The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
Task Details	This section is used to add the tasks that you want to group together under the strategy, and set the task related configurations.
S. No	Indicates the sequence number of performance of task.
Task	Indicates the task type to be added to the strategy. You can search and select the required task code and description for the task type.
Mandatory	Toggle to indicate whether it is mandatory to perform the current task before proceeding to perform the next task in sequence.
Wait Period (Days:Hours:Mins)	Indicates the waiting time before prompting the next task to the collector or initiating the system task after this task is completed. For example, if you specify the wait period as 2 days, 6 hours, and 30 minutes, system will prompt the next task to the collector after the specified wait period on completion of this task. **Note:** This field is enabled only for mandatory tasks.
Escalation (Days:Hours:Mins)	Indicates the time allocated to perform the task. If the task is not completed within the specified time, it is escalated to the manager of the collector.
Expiration (Days:Hours:Mins)	Indicates the time after which the task will expire. If the task is not closed within the specified time, system will automatically expire the task and move to the next task in sequence.

Table 8-1 (Cont.) Field Description: Create Strategy

Field Name	Description
Dependency	Click **Add** to configure the dependent task that needs to be performed before initiating the current task. This means before the current task is initiated, the dependent task must be performed and should be in a particular status. When you click **Add**, the **Dependency** section is displayed using which you can add the expression for the dependent task. You need to select the sequence number and dependent task and specify the status in which the dependent task should exist. The task list displays the sequence number and task type of all the previous tasks that you added in the table before the current task. The status list displays the status in which the task must exist. Once you specify the details, the generated expression is displayed in the field. **Note:** This field is not applicable for the first task in sequence. You can add dependent task from second task onwards in the sequence.
Template	Click to add correspondence template for the task. **Note:** You can add multiple correspondence templates for a task. However, you need to mark one template as default.

This section consists of the following topic:

- Creating a Strategy

8.1.1 Creating a Strategy

For creating a strategy, you need to specify details, such as the code, description, and tasks to be associated with the strategy.

To create a strategy:

Before you create a strategy, ensure that tasks are created in the system.

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Strategy** and then click **Create Strategy.**

   The **Create Strategy** page appears.
3. In the **Code** field, enter a unique identification code for the strategy.
4. In the **Description** field, enter a description of the strategy.
5. In the **Effective Date** field, select the date from when the strategy is effective in the system.
6. In the **Task Details** section, click .
7. In the **Task** field, click and select the task you want to associate with the strategy.
8. In the **Mandatory** field, toggle the switch as required to indicate whether it is mandatory to perform the current task before the next task in sequence is performed.
9. In the **Escalation** field, enter the time allocated to perform the task.
10. In the **Template** field, enter the correspondence template of the task is of type email.
11. Click **Save.**

    A message appears that the record is saved successfully.

Once the strategy is created, you can view the same using the **View Strategy** page. Upon creation, the authorization status of the strategy is **Unauthorized** and the record status is **Open.** After a strategy is created, it must be authorized to be effective in the system.
The strategies that need to be applied on an account or customer for collection of unpaid dues, should be associated with the required segment. For more information, see the Segment.

8.2 View Strategy

The **View Strategy** page facilitates you to view the list of strategies created in the system and perform various actions on a strategy.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a strategy.

You can perform the following actions:

- Modify details of a strategy. However, only the maker can modify a strategy before the first authorization. Once the first authorization is done, the strategy can be modified by any other user.
- Authorize the strategy that are created, modified, closed, or reopened.
- Close an authorized strategy that you don’t want to use.
- Reopen a closed strategy.
- Delete a strategy that is not yet authorized upon creation. Only the maker of the strategy, can delete it. Once a strategy is authorized, you cannot delete it.
- View detailed information of a strategy in read-only mode.

Table 8-2 Field Description: View Strategy - Tile

Field Name	Description
Strategy Code	Displays the strategy code.
Strategy Description	Displays the description of the strategy.
Effective Date	Displays the date from when the strategy is effective in the system.
<Authorization Status>	Displays the authorization status of the strategy. The possible options are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click . Using this section, you can quickly search for strategies based on the specified search criteria.

Table 8-3 Field Description: View Strategy - Search

Field Name	Description
Strategy Code	Indicates the strategy code.
Strategy Description	Indicates the description of the strategy.

Table 8-3 (Cont.) Field Description: View Strategy - Search

Field Name	Description
Authorization Status	Indicates the authorization status of the strategy. The options are: • **Authorized:** Select this option if you want to search for a strategy with Authorized status. • **Unauthorized:** Select this option if you want to search for a strategy with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a strategy in Open status. • **Closed:** Select this option if you want to search for a strategy in Closed status.

This section consists of the following topic:

- Viewing List of Strategies

8.2.1 Viewing List of Strategies

The **View Strategy** page facilitates you to view the list of strategies created in the system and perform various actions on a strategy.

To view the list of strategies:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Strategy** and then click **View Strategy.**
3. View the list of strategies created in the system.
4. If you want to search for a particular strategy:
   a. Click .
   b. Enter the search criteria and click **Search.**

Note:

If you want to create a strategy from this page, click +. For more information, see Create Strategy.
For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

9
Segment

In Oracle Banking Collections, once the cases are created, the associated accounts are assigned to relevant segments. Accounts are identified and assigned to the segments based on the rules configured for a segment.

A segment is used to group accounts for applying various strategies to collect the amount due on the accounts. Each strategy consists of a group of tasks that are performed on the accounts assigned to the segment. The tasks to be performed on an account assigned to a segment are allocated based on the following configurations of the segment:

- If **Ignore Group Basis** toggle switch is enabled for a segment, then all the tasks are allocated to a particular collector based on the user assignment code set for the strategies mapped to segment.
- If **Ignore Group Basis** toggle switch is not enabled for a segment, then all the tasks are allocated to the default collector of the account.

You can create and manage segments using the following pages:

- Create Segment
- View Segment

9.1 Create Segment

The **Create Segment** page facilitates you to create a segment. You can create a segment to which the accounts are assigned. While creating a segment, you can configure rules based on which the accounts will be assigned to the segment. You can also associate one or more strategies with the segment.

Table 9-1 Field Description: Create Segment

Field Name	Description
Basic Details	This section is used to provide basic information of the segment.
Code	Indicates the unique identification code of the segment.
Description	Indicates description of the segment.
Product Processor	Indicates the product processor applicable for the segment.
Group Basis	Displays the group basis of the product processor that is applicable on the segment. The possible values are: • **Account** • **Customer** The group basis is displayed as per configurations defined for the selected product processor. **Note:** The value in this field is displayed once you select the product processor.

Table 9-1 (Cont.) Field Description: Create Segment

Field Name	Description
Ignore Group Basis	Toggle to indicate whether the strategies mapped to the segment should be assigned to a specific collector. If the toggle switch is enabled, strategies in the segment are assigned to a specific collector. If the toggle switch is not enabled, strategies in the segment are assigned to the default collector of the account. **Note:** If the switch is enabled, the allocation of tasks is done based on the user assignment code selected in the **User Assignment** field in **Strategy** tab.
Effective Date	Indicates the date from when the segment is effective in the system. **Note:** The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
Expiry Date	Indicates the date till when the segment is effective in the system. **Note:** The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
Selection Criteria	This tab is used to configure rules based on which account are allocated to the segment. For more information on how to configure rules, see *Oracle Banking Common Core User Guide.*
Strategy	This tab is used to associate strategies that are applicable on the segment. **Note:** You can associated one or more strategies with the segment.
S.No	Displays the sequence number of the strategy.
Strategy	Indicates the strategy associated with the segment.
User Assignment	Indicates the user assignment code based on which all the tasks related to the strategies are allocated to the users. **Note:** This field is displayed only if **Ignore Group Basis** switch is turned on.
Call Details	Indicates the call action applicable for the strategy.
Enabled	Toggle to indicate whether the strategy is enabled for the segment.

Related Topics

For more information on...	See...
How to create user assignment	Creating an User Assignment

This section consists of the following topic:

- Creating a Segment

9.1.1 Creating a Segment

For creating a segment, you need to specify details, such as code, description, and the date from when it is effective.

To create a segment:

Strategy and User Assignment must be created in the system.

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Segment** and then click **Create Segment.**

   The **Create Segment** page appears.
3. In the **Code** field, enter a unique identification code for the segment.

4. In the **Description** field, enter a description of the segment.
5. From the **Product Processor** list, select the product processor.
6. In the **Effective Date** field, select the date from when the information received from the product processor is effective in the system.
7. In the **Selection Criteria** tab, configure the rules based on which segmentation of accounts will be done.
8. In the **Strategy** tab, enter the details.
   a. From the **Strategy** list, select the strategy.
   b. From the **User Assignment** list, select the user assignment code to which the segment should be assigned.
   c. From the **Call Details** list, select the call action for the strategy.
9. Click **Save.**

   A message appears that the record is saved successfully.

Once the segment is created, you can view the same using the **View Segment** page. Upon creation, the authorization status of the segment is **Unauthorized** and the record status is **Open.** After a segment is created, it must be authorized to be effective in the system.

9.2 View Segment

The **View Segment** page facilitates you to view the list of segments created in the system and perform various actions on a segment.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a segment.

You can perform the following actions:

- Modify details of a segment. However, only the maker can modify a segment before the first authorization. Once the first authorization is done, the segment can be modified by any other user. If you modify a segment, the modified segment is applicable on the next segment assignment process and not to the current active assignment.
- Authorize the segment that are created, modified, closed, or reopened.
- Close an authorized segment that you don’t want to use.
- Reopen a closed segment.
- Delete a segment that is not yet authorized upon creation. Only the maker of the segment, can delete it. Once a segment is authorized, you cannot delete it.
- View detailed information of a segment in read-only mode.

Table 9-2 Field Description: View Segment - Tile

Field Name	Description
Segment Code	Displays the segment code.
Segment Description	Displays the description of the segment.
Product Processor	Displays the product processor for the segment.

Table 9-2 (Cont.) Field Description: View Segment - Tile

Field Name	Description
Group Basis	Displays the group basis of the segment. The possible values are: • **Customer** • **Account**
<Authorization Status>	Displays the authorization status of the segment. The possible values are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for segments based on the specified search criteria.

Table 9-3 Field Description: View Segment - Search

Field Name	Description
Segment Code	Indicates the segment code.
Segment Description	Indicates the description of the segment.
Authorization Status	Indicates the authorization status of the segment. The options are: • **Authorized:** Select this option if you want to search for a segment with Authorized status. • **Unauthorized:** Select this option if you want to search for a segment with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a segment in Open status. • **Closed:** Select this option if you want to search for a segment in Closed status.

This section consists of the following topic:

- Viewing List of Segments

9.2.1 Viewing List of Segments

You can view the list of segments created in the system and search for a particular segment.
To view the list of segments:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Segment** and then click **View Segment.**
3. View the list of segments created in the system.
4. If you want to search for a particular segment:
   a. Click 🔍.

b. Enter the search criteria and click **Search.**

Note:

If you want to create a segment from this page, click +. For more information, see Create Segment.
For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

10
User Group

A user group helps you to manage the collection users and agencies who perform various tasks and activities. When you create a user group, you can assign the users or agencies to the relevant user groups.

You can create and manage user groups using the following pages:

- Create User Group
- View User Group

10.1 Create User Group

The **Create User Group** page facilitates you to create a user group. While creating a user group, you can set the hierarchy order of the user group. You can set the supervisor group for the user group.

You can associate users or agencies IDs to the user group and set active status of the users or agencies in the user group. Strategies and Tasks are assigned to only active users or agencies of the user group.

Table 10-1 Field Description: Create User Group

Field Name	Description
Basic Details	This section is used to provide the basic information of the user group.
Code	Indicates the unique identification code of the user group.
Description	Indicates the description of the user group.
Hierarchy Order	Indicates the order of the user group in the hierarchy of user groups. **Note:** You can set same hierarchy order for multiple user groups. The hierarchy order of the user group you want to create should be less than the hierarchy order of the supervisor group.
Supervisory Group	Indicates the supervisor group for the user group. **Note:** You must select only that supervisor group which contains all the managers of the users that you select for the user group. Users are mapped to the managers while creating users in Security Management. For more information, see *Oracle Banking Security Management System User Guide.*
Default Assignee	Indicates whether the user group that you want to create is the default group. If any accounts remain pending for assignment after all the accounts are assigned as per the user assignment priority, then such accounts are assigned to the default user group. **Note:** You can mark only one user group as default assignee. If a default assignee user group is not defined in the system, the account pending for assignment are not allocated to any user group or user.
Agency	Indicates whether the user group you want to create is for agency.
User Details	This section is used to assign users to the user group. **Note**: This section will be displayed only when agency option is selected as off.

Table 10-1 (Cont.) Field Description: Create User Group

Field Name	Description
User ID	Indicates the unique identification code of the user that you want to assign to the user group. **Note:** You must select only those users that have the associated manager present in the selected supervisor group. For more information, see *Oracle Banking Security Management System User Guide.*
User Name	Displays the user name of the selected user ID.
Active	Indicates whether the user is active for the user group.
Agency Details	This section is used to assign agencies to the user group. **Note**: This section will be displayed only when agency option is selected. It displays the following fields.
Agency Code	Indicates the unique identification code of the agency that you want to assign to the user group. **Note**: You must select only those users that have the associated manager present in the selected supervisor group. For more information, see **Oracle Banking Security Management System User Guide**.
Agency Name	Displays the name of the selected agency.
Active	Indicates whether the agency is active for the user group.

This topic contains the following sub-topics:

- Creating a User Group

10.1.1 Creating a User Group

For creating a user group, you need to specify details, such as code, description, and hierarchy order of the user group.

To create a user group:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **User Group** and then click **Create User Group.**

   The **Create User Group** page appears.
3. In the **Code** field, enter a unique identification code for the user group.
4. In the **Description** field, enter a description of the user group.
5. In the **Hierarchy Order** field, enter the order of the user group in the hierarchy of user groups.
6. In the **User Details** section, click .

   A row is added in the user details table.
7. From the **User ID** list, select the user ID that you want to assign to the user group.
8. In the **Active** field, enable the toggle switch for the users that are active for the user group.
9. Click **Save.**

   A message appears that the record is saved successfully.

Once the user group is created, you can view the same using the **View User Group** page. Upon creation, the authorization status of the user group is **Unauthorized** and the record status is **Open.** After a user group is created, it must be authorized to be effective in the system.

10.2 View User Group

The **View User Group** page facilitates you to view the list of user groups and perform various actions on a user group.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a user group.

You can perform the following actions:

- Modify details of a user group. However, only the maker can modify a user group before the first authorization. Once the first authorization is done, the user group can be modified by any other user.
- Authorize the user groups that are created, modified, closed, or reopened.
- Close an authorized user group that you don't want to use.
- Reopen a closed user group.
- Delete a user group that is not yet authorized upon creation. Only the maker of the user group, can delete it. Once a user group is authorized, you cannot delete it.
- View detailed information of a user group in read-only mode.

Table 10-2 Field Description: View User Group - Tile

Field Name	Description
Code	Displays the user group code.
Description	Displays the description of the user group.
Supervisory Group	Displays the supervisor group for the user group.
Hierarchy Order	Displays the hierarchy order of the user group.
Default Assignee	Displays if the user group is marked as default group.
<Authorization Status>	Displays the authorization status of the user group. The possible options are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for user groups based on the specified search criteria.

Table 10-3 Field Description: User Group - Search

Field Name	Description
Code	Indicates the user group code.
Description	Indicates the description of the user group.
Supervisory Group	Indicates the supervisor group of the user group.

Table 10-3 (Cont.) Field Description: User Group - Search

Field Name	Description
Default Assignee	Indicates whether the user group that you want to search is the default group.
Agency	Indicates whether the user group that you want to search is the agency group.
Authorization Status	Indicates the authorization status of the user group. The options are: • **Authorized:** Select this option if you want to search for a user group with Authorized status. • **Unauthorized:** Select this option if you want to search for a user group with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a user group in Open status. • **Closed:** Select this option if you want to search for a user group in Closed status.

This topic contains the following sub-topics:

- Viewing List of User Groups

10.2.1 Viewing List of User Groups

You can view the list of user groups created in the system and search for a particular user group.

To view the list of user groups:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **User Group** and then click **View User Group.**
3. View the list of user groups created in the system.
4. If you want to search for a particular user group:
   a. Click 🔍.
   b. Enter the search criteria and click **Search.**

> **Note:**
>
> If you want to create a user group from this page, click +. For more information, see Create User Group.
> For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

11

User Assignment

User Assignment facilitates you to set the required configurations to assign tasks to the users or agencies based on their capabilities, skill sets, and expertise. You can configure rules and associate user groups with the user assignment. The tasks are assigned to user groups associated with the user assignment.

You can create and manage user assignments using the following pages:

- Create User Assignment
- View User Assignment

11.1 Create User Assignment

The **Create User Assignment** page facilitates you to create a user assignment. A user assignment helps to configure rules based on which accounts, customers, and tasks are assigned to the users. You can select the product processor from where the account and customer details will be received for user assignment.

You can choose whether grouping basis is applicable for user assignment. You can also specify the user assignment method, which is the assignment logic to be used. You can associate the user groups with the user assignment. Based on the configurations you define for user assignment, strategies and its tasks are assigned to the users of the associated user groups.

Table 11-1 Field Description: Create User Assignment

Field Name	Description
Basic Details	This section is used to provide basic information of the user assignment.
Code	Indicates the unique identification code of the user assignment.
Description	Indicates the description of the user assignment.
Priority	Indicates the priority for execution of the user assignment. **Note:** Priority must be unique for each user assignment. This field is disabled if **Ignore Group Basis** switch is turned on.
Assignment Method	Indicates the assignment method. The options are: • **Round Robin**
Product Processor	Indicates the product processor applicable for user assignment.

Table 11-1 (Cont.) Field Description: Create User Assignment

Field Name	Description
Group Basis	Displays the group basis. The possible options are: • **Account** • **Customer** **Note:** The group option appears as defined for the selected product processor. If the grouping option is **Account,** accounts received from the product processor are assigned to different collectors. Also, all the user tasks created on the accounts are assigned to different collectors. If the grouping option is **Customer** all the accounts related to a customer are assigned to only one particular collector. All the tasks related to the customer are also assigned to one particular collector.
Ignore Group Basis	Toggle to indicate whether group basis is ignored for user assignment. **Note:** If the toggle switch is enabled, then: • configurations set for rules in **Selection Criteria** tab are not applicable. • grouping basis of customer or account is ignored and tasks are assigned to various collectors based on skills and expertise.
Specialized	Toggle to indicate whether this is specialized user assignment. **Note**: When Ignore Group Basis is selected, the toggle switch is displayed.
Agency	Toggle to indicate whether this is agency assignment.
Effective Date	Indicates the date from when the user assignment is effective in the system. **Note:** The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
Expiry Date	Indicates the date till when the user assignment is effective in the system. **Note:** The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
Selection Criteria	This tab is used to configure rules based on which system assigns the segment to a user group. It also identifies the accounts or customers to be assigned to the user group. For more information on how to configure rules, see *Oracle Banking Common Core User Guide.*
User Group	This tab is used to associate user groups to the user assignment.
User Group	Indicates the user group. If agency toggle is not selected , the list displays all the open and authorized user groups which are non-agency groups. If agency toggle is selected , the list displays all the open and authorized user groups which are agency groups.
Description	Displays the description of the user group.
Active	Toggle to indicate whether user group association is active for the user or agency assignment.

This topic contains the following sub-topics:

- Creating an User Assignment

11.1.1 Creating an User Assignment

For creating a user assignment, you need to specify details, such as the code, description, and product processor.

To create an user assignment:

Ensure that user groups are created in the system.

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **User Assignment** and then click **Create User Assignment.**

   The **Create User Assignment** page appears.
3. In the **Code** field, enter a unique identification code for the user assignment.
4. In the **Description** field, enter a description of the user group.
5. In the **Priority** field, enter the priority of the user assignment.
6. From the **Product Processor** list, select the product processor.
7. From the **Assignment Method** list, select the assignment method.
8. In the **Effective Date** field, enter the date from when the user assignment is effective in the system.
9. In the **Selection Criteria** tab, configure rules for user assignment.
10. In the **User Group** tab, enter the required details to associate user groups to the user assignment.
11. Click **Save.**

    A message appears that the record is saved successfully.

Once the user assignment is created, you can view the same using the **View User Assignment** page. Upon creation, the authorization status of the user assignment is **Unauthorized** and the record status is **Open.** After a user assignment is created, it must be authorized to be effective in the system.

11.2 View User Assignment

The **View User Assignment** page facilitates you to view the list of user assignments created in the system and perform various actions on a user assignment.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a user assignment.

You can perform the following actions:

- Modify details of a user assignment. However, only the maker can modify a user assignment before the first authorization. Once the first authorization is done, the user assignment can be modified by any other user.
- Authorize the user assignments that are created, modified, closed, or reopened.
- Close an authorized user assignment that you don’t want to use.
- Reopen a closed user assignment.
- Delete a user assignment that is not yet authorized upon creation. Only the maker of the user assignment, can delete it. Once a user assignment is authorized, you cannot delete it.
- View detailed information of a user assignment in read-only mode.

Table 11-2 Field Description: View User Assignment - Tile

Field Name	Description
Code	Displays the user assignment code.
Description	Displays the description of the user assignment.
Assignment Method	Displays the assignment method.
Priority	Displays the priority of the user assignment.
Product Processor	Displays the product processor of the user assignment.
<Authorization Status>	Displays the authorization status of the user assignment. The possible values are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible values are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for user assignments based on the specified search criteria.

Table 11-3 Field Description: View User Assignment - Search

Field Name	Description
Code	Indicates the user assignment code.
Description	Indicates the description of the user assignment.
Ignore Group Basis	Toggle to indicate whether group basis is ignored for user assignment records that you want to search.
Agency	Toggle to indicate whether you want to search for agency assignment.
Assignment Method	Indicates the assignment method.
Authorization Status	Indicates the authorization status of the user assignment. The options are: • **Authorized:** Select this option if you want to search for an user assignment with Authorized status. • **Unauthorized:** Select this option if you want to search for an user assignment with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for an user assignment in Open status. • **Closed:** Select this option if you want to search for an user assignment in Closed status.

This topic contains the following sub-topics:

- Viewing List of User Assignments

11.2.1 Viewing List of User Assignments

You can view the list of user assignments created in the system and search for a particular user assignment.

To view the list of user assignments:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**

2. From the **Maintenance** menu, click **User Assignment** and then click **View User Assignment.**
3. View the list of user assignments created in the system.
4. If you want to search for a particular user assignment:
   a. Click 🔍.
   b. Enter the search criteria and click **Search.**

> **Note:**
>
> If you want to create a user assignment from this page, click +. For more information, see Create User Assignment.
> For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

12

Promise Type

A promise type is used while creating a promise to pay to track the promise of payment made by the customer. You can create promise types based on your requirement for handling promise to pay of accounts that belong to different segments.

For example, you may want to create promise to pay for accounts that belong to a certain segment, with grace days as 20 and threshold limit as 30%. In this scenario, you can create a promise type with these configurations and choose the required segment to which it will be applicable.

You can create and manage promise types using the following pages:

- Create Promise Type
- View Promise Type

12.1 Create Promise Type

The **Create Promise Type** page facilitates you to create a promise type. You can create promise types with different configurations that will be used to create promise to pay for various segments. A promise to pay is made by the customer to pay the amount due on the delinquent account.

While creating a promise type, you can select the segments to which the promise type will be applicable. You can set the grace days and threshold limit for the promise type. You can also configure any additional validations for the promise type.

You can configure alerts for various events and the templates for sending the alerts.

Table 12-1 Field Description: Create Promise Type

Field Name	Description
Basic Details	This section is used to provide basic information of the promise type.
Code	Indicates the unique identification code of the promise type.
Description	Indicates the description of the promise type.
Segment	Indicates the segment to which the promise type is associated. You can select multiple segments. If you do not select any segment, the promise type is applicable for all segments by default.
Grace Days	Indicates the number of grace days allowed to the customer for payment of the promised amount against the promise to pay. It is the additional number of days allowed to make payment if the customer fails to pay on the promised date.
Threshold (%)	Indicates the threshold limit in percentage of the promised amount. **Note:** The limit should not be greater than 100%.
Alert Configuration	This tab is used to set configurations for sending alerts to the customer.

Table 12-1 (Cont.) Field Description: Create Promise Type

Field Name	Description
Event	Indicates the event for which you want to configure alert. The options are: • **Reminder** • **PTP Capture** • **PTP Kept** • **PTP Broken** **Note:** If you are configuring multiple communication modes for an event type, ensure that each event type and communication mode combination is unique. However, this is not applicable if you select event type as **Reminder.**
Reminder Days	Indicates the number of days prior to the promised date of payment when the reminder should be sent to the customer. **Note:** This field is enabled only if you select **Reminder** option in the **Event** field.
Recipient Type	Indicates the recipient type to which the alert is to be sent. The options are: • **Primary** • **Financial Owners** • **All**
Communication Mode	Indicates the mode of communication for sending the alert. The options are: • **Email** • **SMS** • **Letter**
Template/Rule	Indicates the template in which the alert will be sent using the communication mode. The options are: • **Template:** Select this option if you want to select a template. • **Rule:** Select this option if you want to select a rule based on which the template will be selected by the system. Based on the option selected, you need to select template or rule in the adjacent field.
Additional Validation	This tab is used to configure rules for additional validations for the promise type. For more information on how to configure rules, see *Oracle Banking Common Core User Guide.*

This section consists of the following topic:

- Creating a Promise Type

12.1.1 Creating a Promise Type

For creating a promise type, you need to specify details, such as code, description, and grace days.

To create a promise type:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Promise Type** and then click **Create Promise Type.**

   The **Create Promise Type** page appears.
3. In the **Code** field, enter a unique identification code for the promise type.

4. In the **Description** field, enter a description of the promise type.
5. In the **Grace Days** field, enter the number of grace days allowed to the customer for making payment against the promise type.
6. In the **Threshold (%)** field, enter the threshold limit in percentage for the promise type.
7. In the **Alert Configuration** tab, select the promise type event from the **Event** list.
8. If you have selected **Reminder** option in the **Event** field, enter the number of days after which reminder should be sent to the customer in the **Reminder Days** field.
9. From the **Recipient Type** list, enter the recipient type to which the alert is to be sent.
10. From the **Communication Mode** list, select the mode of communication for sending the alert.
11. From the **Template/Rule** list, select the appropriate option.
    - In the adjacent field, click 🔍 and select the required template or rule.
12. Click **Additional Validation** tab and configure rules for promise type.
13. Click **Save.**

Once the promise type is created, you can view the same using the **View Promise Type** page. Upon creation, the authorization status of the promise type is **Unauthorized** and the record status is **Open.** After a promise type is created, it must be authorized to be effective in the system.

12.2 View Promise Type

The **View Promise Type** page facilitates you to view the list of promise types created in the system and perform various actions on a promise type.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a promise type.

You can perform the following actions:

- Modify details of a promise. However, only the maker can modify a promise type before the first authorization. Once the first authorization is done, the promise type can be modified by any other user.
- Authorize the promise types that are created, modified, closed, or reopened.
- Close an authorized promise types that you don’t want to use.
- Reopen a closed promise type.
- Delete a promise type that is not yet authorized upon creation. Only the maker of the promise type, can delete it. Once a promise type is authorized, you cannot delete it.
- View detailed information of a promise type in read-only mode.

Table 12-2 Field Description: View Promise Type - Tile

Field Name	Description
Code	Displays the promise type code.
Description	Displays the description of the promise type.
Grace Days	Displays the number of grace days of the promise type.

Table 12-2 (Cont.) Field Description: View Promise Type - Tile

Field Name	Description
<Authorization Status>	Displays the authorization status of the promise type. The possible options are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click . Using this section, you can quickly search for promise types based on the specified search criteria.

Table 12-3 Field Description: Promise Type - Search

Field Name	Description
Code	Indicates the promise type code.
Description	Indicates the description of promise type.
Authorization Status	Indicates the authorization status of the promise type. The options are: • **Authorized:** Select this option if you want to search for a promise type with Authorized status. • **Unauthorized:** Select this option if you want to search for a promise type with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a promise type in Open status. • **Closed:** Select this option if you want to search for a promise type in Closed status.

This section consists of the following topic:

- Viewing List of Promise Types

12.2.1 Viewing List of Promise Types

You can view the list of promise types created in the system and search for a particular promise type.

To view the list of promise types:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Promise Type** and then click **View Promise Type.**
3. View the list of promise types created in the system.
4. If you want to search for a particular promise type:
   a. Click .
   b. Enter the search criteria and click **Search.**

Note:

If you want to create a promise type from this page, click +. For more information, see Create Promise Type.
For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

13 Seed Data

The seed data codes are used to process, map, and store the corresponding information received for the same from the product processors. You can maintain seed data codes for various seed data types.

You need to configure seed data for a product processor at the time of day zero setup. However, system facilitates you to configure or update any seed data as and when required.

You can create and manage seed data using the following pages:

- Create Seed Data
- View Seed Data

13.1 Create Seed Data

The **Create Seed Data** page facilitates you to create seed data for various seed data types. While creating seed data codes for Oracle Banking Collections,you also need to specify the corresponding value for the same that will be received from the product processor.

When the batch is run, system will map the seed data codes with the values received for the same from the product processor. The details received are processed and stored in database based on the seed data codes configured for the same. In Oracle Banking Collections, these seed data codes are displayed across various pages based on the configurations and also used in transactions for processing information.

Table 13-1 Field Description: Create Seed Data

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td>Seed Data Type</td><td>Indicates the seed data type for which you want to create seed data.
The options are:
Arrear Type
Asset Class
Collateral Realization Status
Collateral Type
Contact
Document Type
Employment Type
Gender
Identification
Industry Type
Marital Status
Name Type
Party Type
Product Code
Product Sub-Type
Product Type
Relationship
Risk Indicators
System Account Status</td></tr>
<tr><td>Additional Details</td><td>This section is used to specify seed data code details for the selected seed data type.</td></tr>
<tr><td>Code</td><td>Indicates the unique identification code of the seed data.
Note: You can configure same code and description for multiple product processors, if required.</td></tr>
<tr><td>Description</td><td>Indicates the description of the code.
For example, if you want to create seed data for seed data type as Relationship, you can add the seed data codes with description as given below:
<table><tr><th>Code</th><th>Description</th></tr><tr><td>SOW</td><td>Sole Owner</td></tr><tr><td>JAF</td><td>Joint and First</td></tr><tr><td>GUA</td><td>Guarantor</td></tr></table>Note: The description of code will be displayed in relevant fields across the pages based on the configurations defined.</td></tr>
<tr><td>Category</td><td>Indicates the category of contact type.
The options are:
Phone
Address
EMAIL
Messaging
SNP
Note: This field is displayed only if you select Contact in Seed Data Type field.</td></tr>
</table>

Table 13-1 (Cont.) Field Description: Create Seed Data

Field Name	Description
Primary	Toggle to indicate whether the specified name type is primary. **Note:** You must configure at least one name type as primary for a product processor. This field is displayed only if you select **Name Type** in the **Seed Data Type** field.
Primary Party	Toggle to indicate whether the specified relationship is the primary party. **Note:** You must configure at least one relationship as primary party for a product processor. This field is displayed only if you select **Relationship** in the **Seed Data Type** field.
Product Type	Indicates the product type. For example, loans, overdraft, and credit card. **Note:** This field is displayed only if you select **Product Type** in the **Seed Data Type** field.
Product Processor Mapping	This section appears if you click ▶ corresponding to a row in the **Additional Details** table. It is used to specify details of the product processor to which you want to map the seed data. You can map one or more product processors with a seed data.
Product Processor	Indicates the product processor to which you want to associate the seed data.
Value	Indicates the corresponding value received from the product processor for the configured seed data code. The value that you enter in the **Code** field is mapped with this value. When batch is run, system will map the seed data codes configured with these values that are received from the product processor, and process the information and store it in Oracle Banking Collections. These seed data details are used in transactions and displayed across the pages based on configurations defined.
Comment	Indicates any comments related to the product processor.

This section consists of the following topic:

- Creating Seed Data

13.1.1 Creating Seed Data

For creating seed data for a seed data type, you need to specify details, such as seed data type, code, and description.

To create seed data:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Seed Data** and then click **Create Seed Data.**

   The **Create Seed Data** page appears.
3. From the **Seed Data Type** list, select the seed data type for which you want to configure seed data.
4. In **Additional Details** section, click .

   A row is added in the table. You can add one or more rows depending on the number of seed data codes you want to configure for the seed data type.

5. In the **Code** field, enter a unique identification code for the seed data you want to configure for the seed data type.
6. In the **Description** field, enter a description of the code.
7. Click ▶ corresponding to the required row.
8. In the **Product Processor Mapping** section, click +.

   A row is added in the table. You can add one or more rows depending on the number of product processors to which you want to map the seed data code. If you want to map the seed data code with all the product processors, enable the **Select All Processor** toggle switch.
9. From the **Product Processor** list, select the product processor to which you want to map the seed data code.
10. In the **Value** field, enter the corresponding value that will be received from the product processor for the seed data code.
11. Click **Save.**

Once the seed data is created, you can view the same using the **View Seed Data** page. Upon creation, the authorization status of the seed data is **Unauthorized** and the record status is **Open.** After a seed data is created, it must be authorized to be effective in the system.

13.2 View Seed Data

The **View Seed Data** page facilitates you to view the list of seed data created in the system and perform various actions on seed data.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a seed data.

You can perform the following actions:

- Modify details of a seed data. However, only the maker can modify a seed data before the first authorization. Once the first authorization is done, the seed data can be modified by any other user. While modifying a seed data, you cannot delete a code in the **Additional Details** section, if it used for any transactions in the system.
- Authorize the seed data that are created, modified, closed, or reopened.
- Close an authorized seed data that you don't want to use.
- Reopen a closed seed data.
- Delete a seed data that is not yet authorized upon creation. Only the maker of the seed data, can delete it. Once a seed data is authorized, you cannot delete it.
- View detailed information of a seed data in read-only mode.

Table 13-2 Field Description: View Seed Data - Tile

Field Name	Description
Seed Data Type	Displays the seed data type.
Total Number of Codes	Displays the total number of codes defined for the seed data type.

Table 13-2 (Cont.) Field Description: View Seed Data - Tile

Field Name	Description
<Authorization Status>	Displays the authorization status of the seed data. The possible options are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible options are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for seed data based on the specified search criteria.

Table 13-3 Field Description: View Seed Data - Search

Field Name	Description
Seed Data Type	Indicates the seed data type.
Authorization Status	Indicates the authorization status of the seed data. The options are: • **Authorized:** Select this option if you want to search for a seed data with Authorized status. • **Unauthorized:** Select this option if you want to search for a seed data with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a seed data with Open status. • **Closed:** Select this option if you want to search for a seed data with Closed status.

This section consists of the following topic:

- Viewing List of Seed Data

13.2.1 Viewing List of Seed Data

You can view the list of seed data created in the system and search for a particular seed data.

To view the list of seed data:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Seed Data** and then click **View Seed Data.**
3. View the list of seed data created in the system.
4. If you want to search for a particular seed data:
   a. Click 🔍.
   b. Enter the search criteria and click **Search.**

Note:

If you want to create seed data from this page, click +. For more information, see Create Seed Data .
For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

14 Communication

You can define a template based on which various types of communication are sent to the customers. For example, emails.

You can create and manage communications using the following pages:

- Create Communication
- View Communication

14.1 Create Communication

The **Create Communication** page facilitates you to create a communication.

Table 14-1 Field Description: Create Communication

Field Name	Description
Mode	Indicates the mode of communication. The options are: • **Letter** • **Email** • **Message** • **WhatsApp**
Code	Indicates the unique identification code of the communication.
Description	Indicates the description of the communication.
Purpose	Indicates purpose of the communication. For example, bankruptcy, delinquency, and legal.
Advice	Indicates template for the attachment that should be sent to the customer along with the communication. **Note:** This field is displayed only if you select **Email** or **Letter** in the **Mode** field.
Recipient	Indicates the recipients of the communication. You can select multiple recipients for a communication.
Block Period (in Days)	Indicates the number of days for block period.
Applicability	Indicates applicability of the communication. By default, **Customer** is selected. **Note:** This field is displayed only if you select **Email** or **Text Message** in **Mode** field.
Execution Type	Indicates the execution type for sending communication. The options are: • **Automatic** • **Manual**
Effective Date	Indicates the date from when the communication is effective in the system. **Note:** The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.

Table 14-1 (Cont.) Field Description: Create Communication

Field Name	Description
Expiry Date	Indicates the date till when the communication is effective in the system. **Note:** The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
Subject	Indicates the template for subject of the email. You can define the subject to send dynamic values for emails. **Note:** This field is enabled only if you select **Email** option in the **Mode** field.
Message Delivery Preference	Indicates the delivery preference. **Note:** You must select the WhatsApp option in the Mode field to enable this field.
Message	Indicates the template for message body of the email. You can define the message body to send dynamic values for emails. You can use the formatting options provided in the box for drafting the message. Click ⛶ to expand the field. **Note:** This field is enabled only if you select **Email** or **Message** option in the **Mode** field.
Selection Criteria	This section is used to configure rules for auto generation of communication by the system. For more information on how to configure rules, see *Oracle Banking Common Core User Guide.* **Note:** This tab is displayed only if you select **Automatic** option in **Execution Type** field.

This section consists of the following topic:

- Creating Communication

14.1.1 Creating Communication

For creating a communication, you need to specify details, such as mode of communication, code, and purpose of communication.

To create a communication:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Communication** and then click **Create Communication.**

   The **Create Communication** page appears.
3. From the **Mode** list, select the communication mode.
4. In the **Code** field, enter a unique identification code for the communication template.
5. In the **Description** field, enter a description of the communication template.
6. From the **Purpose** list, select the purpose of communication.
7. In the **Attachment** field, select the template for the attachment that should be sent to the customer along with the communication.

   This is mandatory if you are creating communication for Letter.
8. From the **Recipient** list, select the recipients of the communication.
9. From the **Execution Type** list, select the type of execution for sending communication.
10. From the **Effective Date** list, select the date from when the communication is effective.

11. In the **Subject** field, enter the subject of the email.
12. In the **Message** field, enter the message of the email.
13. Click **Save.**

14.2 View Communication

The **View Communication** page facilitates you to view the list of communications created in the system and perform various actions on a communication.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a communication.

You can perform the following actions:

- Modify details of a communication. However, only the maker can modify a communication before the first authorization. Once the first authorization is done, the communication can be modified by any other user.
- Authorize the communications that are created, modified, closed, or reopened.
- Close an authorized communication that you don’t want to use.
- Reopen a closed communication.
- Delete a communication that is not yet authorized upon creation. Only the maker of the communication, can delete it. Once a communication is authorized, you cannot delete it.
- View detailed information of a communication in read-only mode.

Table 14-2 Field Description: View Communication - Tile

Field Name	Description
Code	Displays the communication code.
Description	Displays the description of the communication.
Mode	Displays the mode of communication.
<Authorization Status>	Displays the authorization status of the communication. The possible values are: • **Unauthorized** • **Authorized**
<Record Status>	Displays the status of the record. The possible values are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for communications based on the specified search criteria.

Table 14-3 Field Description: View Communication - Search

Field Name	Description
Code	Indicates the communication code.
Description	Indicates the description of the communication.
Mode	Indicates the mode of the communication.

Table 14-3 (Cont.) Field Description: View Communication - Search

Field Name	Description
Authorization Status	Indicates the authorization status of the communication. The options are: • **Authorized:** Select this option if you want to search for a communication with Authorized status. • **Unauthorized:** Select this option if you want to search for a communication with Unauthorized status.
Record Status	Indicates the status of the record. The options are: • **Open:** Select this option if you want to search for a communication with Open status. • **Closed:** Select this option if you want to search for a communication with Closed status.

This section consists of the following topic:

- Viewing Communication

14.2.1 Viewing Communication

You can view the list of communications created in the system and search for a particular communication.

To view the list of communications:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Communication** and then click **View Communication.**
3. View the list of communications created in the system.
4. If you want to search for a particular communication.
   a. Click 🔍.
   b. Enter the search criteria and click **Search.**

> **Note:**
>
> If you want to create a communication from this page, click +. For more information, see Create Communication.
> For information on how to perform various actions on a record, such as modify, delete, or authorize, see *Oracle Banking Collections Getting Started User Guide.*

15 Fees and Charges

Fees and Charges facilitates you to set the required configurations to calculate different types of fees and charges on the account. You can configure rules and associate fees and charges to them. The system will then calculate the appropriate fees and charges and apply it to the account.

You can create and manage fees and charges using the following pages:

- Create Fees and Charges
- View Fees and Charges

15.1 Create Fees and Charges

The **Create Fees and Charges** page facilitates you to create a fee to be applied on the account.

Table 15-1 Create Fees and Charges

Field Name	Description
Code	Indicates the unique identification code of the fees and charge.
Description	Indicates the description of the fees and charge.
Type	Indicates the type of fee to be calculated. The options are: • Late Fees • PTP Broken Reversal • Legal Charges • Agency Fees • Repossession Charges • Bankruptcy Charges • Others
Product Processor	Indicates the product processor applicable for the fees and charge.
Effective Date	Indicates the date from when the fees and charge is effective in the system. **Note**: The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
Expiry Date	Indicates the date till when the fees and charge is effective in the system. **Note**: The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
Fee Category	Indicates the category of the fee to be calculated. The options are: • Fixed Amount • Fixed Percent
Fee Method	Indicates the method used for fee calculation. The options are displayed dynamically depending on the fee category selected: • Fixed Amount • Fixed Percent
Fee Value	Indicates the actual value of Fee that will be calculated and applied.

Table 15-1 (Cont.) Create Fees and Charges

Field Name	Description
Base Amount Field	Indicates the Amount field based on which fee will be calculated. The options are: • Overdue Amount • Outstanding Amount • Promised Amount • Received Amount • Principal Amount • Interest Amount
Selection Criteria	This section is used to configure rules for auto calculation of fees and charge by the system. For more information on how to configure rules, see Oracle Banking Common Core User Guide.

This section consists of the following topic:

- Creating Fees and Charges

15.1.1 Creating Fees and Charges

For creating a fees and charge, you need to specify details, such as code, description, type, product processor, fee category and fee method.
To create a fees and charge:

1. From the main menu, navigate to **Collections** and then click **Maintenance**.
2. From the **Maintenance** menu, click **Fees and Charges** and then click **Create Fees and Charges**.

   The **Create Fees and Charges** page appears.
3. In the **Code** field, enter a unique identification code for the fees and charge.
4. In the **Description** field, enter a description of the fees and charge.
5. From the **Type** list, select the type of fees and charge.
6. From the **Product Processor** list, select the product processor of the fees and charge.
7. From the **Effective Date** list, select the date from when the communication is effective.
8. In the **Fee Category list**, select the category of the fees and charge.
9. In the **Fee Method list**, select the method of the fees and charge.
10. In the **Fee Value** field, enter a value for the fees and charge.
11. In the **Base Amount list**, select the base amount field of the fees and charge.
12. In the **Selection Criteria** tab, configure the rules based on which fees and charge will be calculated.
13. Click **Save**.

Once the fees and charge is created, you can view the same using the **View Fees and Charges page**. Upon creation, the authorization status of the fees and charge is **Unauthorized** and the record status is **Open**. After a fees and charge is created, it must be authorized to be effective in the system.

15.2 View Fees and Charges

The **View Fees and Charges** page facilitates you to view the list of fees and charge created in the system and perform various actions on a fees and charge.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of a fees and charge.

You can perform the following actions:

1. Modify details of a fees and charge. However, only the maker can modify a fees and charge before the first authorization. Once the first authorization is done, the fees and charge can be modified by any other user.
2. Authorize the fees and charge that are created, modified, closed, or reopened.
3. Close an authorized fees and charge that you don’t want to use.
4. Reopen a closed fees and charge.
5. Delete a fees and charge that is not yet authorized upon creation. Only the maker of the fees and charge, can delete it. Once a fees and charge is authorized, you cannot delete it.
6. View detailed information of a fees and charge in read-only mode.

Table 15-2 View Fees and Charges - Tile

Field Name	Description
Fee Code	Displays the fee and charge code.
Description	Displays the description of the fee and charge.
Fee Category	Displays the category of fee and charge.
Fee Type	Displays the type of fee and charge.
Authorization Status	Displays the authorization status of the fee and charge. The possible values are: • **Unauthorized** • **Authorized**
Record Status	Displays the status of the record. The possible values are: • **Open** • **Closed**

The search section appears if you click 🔍. Using this section, you can quickly search for fee and charge based on the specified search criteria.

Table 15-3 View Fees and Charges - Search

Field Name	Description
Fee Code	Indicates the fees and charge code.
Fee Type	Indicates the type of the fees and charge.
Fee Category	Indicates the category of the fees and charge.
Authorization Status	Indicates the authorization status of the communication. The options are: • **Authorized**: Select this option if you want to search for a communication with Authorized status. • **Unauthorized**: Select this option if you want to search for a communication with Unauthorized status.

Table 15-3 (Cont.) View Fees and Charges - Search

Field Name	Description
Record Status	Indicates the status of the record. The options are: • **Open**: Select this option if you want to search for a communication with Open status. • **Closed**: Select this option if you want to search for a communication with Closed status.

This section consists of the following topic:

- Viewing Fees and Charges

15.2.1 Viewing Fees and Charges

You can view the list of fees and charges created in the system and search for a particular fees and charge.
To view the list of fees and charges:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Fees and Charges** and then click **View Fees and Charges.** View the list of fees and charges created in the system.
3. To search for a particular fees and charge, click 🔍.
4. Enter the search criteria and click **Search**.

> **Note:**
>
> If you want to create a fees and charge from this page, click +. For more information, see Create Fees and Charges. For information on how to perform various actions on a record, such as modify, delete, or authorize, see **Oracle Banking Collections Getting Started User Guide**.

16

Agency Onboarding

Agency Onboarding facilitates you to create the agencies in the system to which accounts and their related tasks can be assigned.

You can create and manage fees and charges using the following pages:

- Create Agency
- View Agency

16.1 Create Agency

The **Create Agency** page facilitates you to create an agency.

Table 16-1 Field Description: Create Agency

Field Name	Description
Agency Code	Indicates the unique agency code. The list displays all the open and authorized users created in the system.
Agency Name	Indicates the name of the agency.

This section consists of the following topic:

- Creating Agency

16.1.1 Creating Agency

For creating an agency, you need to specify details, such as agency code and agency name.

To create an agency:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Agency Onboarding** and then click **Create Agency.**

   The **Create Agency** page appears.
3. In the **Agency Code** field, search for a unique agency code.
4. The **Agency Name** field will be auto populated based on agency code selected.
5. Click **Save.**

Once the agency is created, you can view the same using the **View Agency page**. Upon creation, the authorization status of the agency is **Unauthorized** and the record status is **Open**. After an agency is created, it must be authorized to be effective in the system.

16.2 View Agency

The **View Agency** page facilitates you to view the list of agencies created in the system and perform various actions.

By default, it displays all the records that exist in open or closed, and authorized or unauthorized status. However, you can search for records with specific search criteria. Each record displays the basic information of an agency.

You can perform the following actions:

- Authorize the agency that are created, modified, closed, or reopened.
- Close an authorized agency that you don't want to use.
- Reopen a closed agency.
- Delete an agency that is not yet authorized upon creation. Only the maker of the agency, can delete it. Once an agency is authorized, you cannot delete it.
- View detailed information of an agency in read-only mode.

Table 16-2 Field Description: View Agency - Tile

Field Name	Description
Agency Code	Displays the agency code.
Agency Name	Displays the name of the agency.

The search section appears if you click 🔍. Using this section, you can quickly search for agency based on the specified search criteria.

Table 16-3 Field Description: View Agency - Search

Field Name	Description
Agency Code	Indicates the agency code.
Agency Name	Indicates the agency name.

This topic contains the following sub-topic:

- Viewing Agency

16.2.1 Viewing Agency

You can view the list of agency created in the system and search for a particular agency.
To view the list of agencies:

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Agency Onboarding** and then click **View Agency**.

   View the list of agencies created in the system.
3. To search for a particular agency:
   a. Click 🔍.
   b. Enter the search criteria and click **Search.**

Note:

If you want to create an agency from this page, click +. For more information, see **Create Agency**. For information on how to perform various actions on a record, such as modify, delete, or authorize, see **Oracle Banking Collections Getting Started User Guide**.

17

Other Configurations

This topic provide information about the Other Configurations.

Below mentioned are other additional configurations required to be verified and setup.

- Other Configurations
  This topic provide information about the Other Configurations.

17.1 Other Configurations

This topic provide information about the Other Configurations.

1. From the main menu, navigate to **Collections** and then click **Maintenance.**
2. From the **Maintenance** menu, click **Lookup** and then click **View Lookup.**

   The **View Lookup** page contains the below listed lookup's.

Table 17-1 Field Description: View Lookup

Lookup Type	Purpose
COL_STAT_CD	List of collection status codes.
OBDX_PARAM	Promise Type when promise to pay is created through digital channel.
PTP_CAN_REASON	List of promise cancel reasons.
INBOUND_DOC_CATEGORY	Indicates purpose of the communication. For example, bankruptcy, delinquency, and legal.
INBOUND_DOC_NAME	List of documents for inbound document upload.
PTP_FREQ	List of promise frequency.
ACTION_CD	List of applicable action types.
ACTIONRESULT_CD	List of applicable result types.
COMMUNICATION_MODE	List of communication modes.

18
Functional Activity Codes

This topic provide information about the Functional Activity Codes.

The table provides the list of functional activity codes for Oracle Banking Collections application These activity codes are required to be mapped to the role which is required to be created for the user mapping. For additional roles to be mapped, see **Oracle Banking Common Core User Guide**.

Table 18-1 List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_ACCOUNT_AMEND	Modify accounts details from feed.
DM_FA_ACCOUNT_IN_COLLECTIONS	Fetch accounts in collections.
DM_FA_ACCOUNT_LIMITED_DETAILS_FETCH	Fetch account details by account id.
DM_FA_ACCOUNT_PARTY_DETAILS_FETCH	Fetch party details of an account.
DM_FA_ACCOUNT_REVIEW_AMEND	Modify account review date.
DM_FA_ACCOUNT_REVIEW_FETCH	Fetch accounts by review date.
DM_FA_ACCOUNT_SUMMARY	Fetch account summary.
DM_FA_ACCOUNT_TOTAL_OVERDUE_AMOUNT_FETCH	Fetch total overdue for an account.
DM_FA_ACCOUNT_WIDGET_CARD_FETCH	Fetch account widget card details.
DM_FA_ACCOUNT_WIDGET_CARD_FETCH_BY_ACCT_ID	Fetch account widget by account id.
DM_FA_ACCOUNT_WIDGET_CARD_FETCH_BY_ACCT_NBR	Fetch account widget by account number.
DM_FA_ACCOUNT_WIDGET_COMPLETE_FETCH	Fetch all details of account widget.
DM_FA_ACCOUNTALLOC_AMEND	Modify account allocation.
DM_FA_ACCOUNTALLOC_GETALL	Get account allocation.
DM_FA_ACCOUNTARREARS_AMEND	Modify account arrear details.
DM_FA_ACCOUNTBILLDETAILS_AMEND	Modify account bill details.
DM_FA_ACCOUNTDELHISTORY_VIEWALL	View delinquency history for an account.
DM_FA_ACCOUNTDETAILS_GET_ACCNT_ID	Fetch account details by account id.
DM_FA_ACCOUNTPARTY_AMEND	Modify existing account party relation.
DM_FA_ACCOUNTPARTY_GET_PARTY_ID	Fetch account party relation by party id.
DM_FA_ACCOUNTREPAYSCH_AMEND	Modify account repayment schedule.
DM_FA_ACCOUNTUSERMAPPING	Account to user mapping.
DM_FA_ACCT_ARREARS_PROCESS_UPDATE	Modify account arrears details.
DM_FA_ACCT_BILL_DTLS_PROCESS_UPDATE	Modify bill details.
DM_FA_ACCT_DTLS_PROCESS_UPDATE	Modify accounts details.
DM_FA_ACCT_NUMBER_COUNT	Fetch count of accounts.
DM_FA_ACCT_PARTY_LIMITED	Fetch account and party details.
DM_FA_ACCT_PARTY_PROCESS_UPDATE	Modify account and party details.
DM_FA_ACCT_PAYMENT_DTLS_BY_ACCTID	Fetch payment details by account.

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_ACCT_PAYMENT_DTLS_BY_DTFLTR	Fetch payment details by date.
DM_FA_ACCT_REPAY_SCH_PROCESS_UPDATE	Modify account repayment schedule.
DM_FA_ACCTID_ACCTNBR_MAPPING	Mapping of account id with account number.
DM_FA_ACCTPARTY_ACCTS	Fetch account party relation by account id.
DM_FA_ACTION_ACC_ALL_COLL_STAT	Fetch collection status details for account id.
DM_FA_ACTION_ACCOUNT_MAPPING	Add account and action mapping
DM_FA_ACTIVE_CASE_ACCOUNTS_FETCH	Fetch active case for account.
DM_FA_ACTIVITY	Fetch active case for account.
DM_FA_ACTIVITY_ADD	Add activity log.
DM_FA_ACTIVITY_LOG	Fetch activity logs.
DM_FA_ACTIVITY_LOG_ACCT_ADDN_INFO	Fetch additional information on activity log widget.
DM_FA_ACTIVITY_LOG_EXP_WID	View activity log expanded widget.
DM_FA_ACTIVITY_LOG_UNIQUE_USERS	Fetch activity log by unique users.
DM_FA_ACTIVITY_LOG_WIDGET_CARD_FETCH_BY_ACCT_ID	Fetch activity log by account.
DM_FA_ACTIVITY_SERVICES_HEALTH_CHECK	Health check for activity services.
DM_FA_ADHOC_TASK_NEW	Create adhoc task.
DM_FA_ADHOC_TASK_VIEW	View adhoc task.
DM_FA_AI_SCORE	Fetch ai widget details.
DM_FA_ALERTS	Fetch collections alerts.
DM_FA_ALL_ASSOCIATEDSEGMENTS	Fetch all linked segments with accounts.
DM_FA_ALL_CASE_HIST_COUNT	Fetch historical count of communication details.
DM_FA_ALL_KPI_VALUES	Fetch all key performance indicator values.
DM_FA_ALL_PTP_KPI_INFO	Fetch all promise related key performance indicators.
DM_FA_ASSIGN_TASK	Assign task to user.
DM_FA_CALL_ACTION_ACTIONRESULTCNTBYTASKID	Fetch action result by task.
DM_FA_CALL_ACTION_GETALLACTIONRELATEDKPIS	Fetch all action related key performance indicators.
DM_FA_CALL_ACTION_GETCALLACTIONRESULTCOUNT	Fetch action result count for dashboard.
DM_FA_CALL_ACTION_SUMMARY	Fetch call action summary.
DM_FA_CALL_HISTORY	Fetch call history details.
DM_FA_CALL_SUMMARY	Fetch call task details.
DM_FA_CALL_TYPE_COUNT	Fetch count of call types.
DM_FA_CALLACTION_ACTION_BATCH_FACTS	Fetch facts for actions.
DM_FA_CALLACTION_ACTION_DETAILS	Fetch collections action details.
DM_FA_CALLACTION_ACTION_DETAILS_NEW	View action details on call action.
DM_FA_CALLACTION_ACTION_DETAILS_VIEW	View action details on call action.
DM_FA_CALLACTIONMAINTENANCE_ACTIONS	Fetch actions for call action maintenance .
DM_FA_CALLACTIONMAINTENANCE_AMEND	Modify call action code details.
DM_FA_CALLACTIONMAINTENANCE_AUTHORIZE	Authorize call action code.

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_CALLACTIONMAINTENANCE_AUTHQUERY	Call action authorization.
DM_FA_CALLACTIONMAINTENANCE_CLOSE	Close call action code.
DM_FA_CALLACTIONMAINTENANCE_COLLSTAT_HIST_NEW	Add collections status history.
DM_FA_CALLACTIONMAINTENANCE_COLLSTAT_REVERSE_NEW	Remove collections status history.
DM_FA_CALLACTIONMAINTENANCE_COPY	Copy call action code.
DM_FA_CALLACTIONMAINTENANCE_DELETE	Delete call action code.
DM_FA_CALLACTIONMAINTENANCE_GETACCTID	Fetch collections status by account id.
DM_FA_CALLACTIONMAINTENANCE_GETEXISTINGCOLLSTATUS	Get existing collection status in call action maintenance.
DM_FA_CALLACTIONMAINTENANCE_HISTORY	View call action code history.
DM_FA_CALLACTIONMAINTENANCE_NEW	Create call action code.
DM_FA_CALLACTIONMAINTENANCE_REOPEN	Reopen call action code.
DM_FA_CALLACTIONMAINTENANCE_SERVICES_HEALTH_CHECK	Health check for call action service.
DM_FA_CALLACTIONMAINTENANCE_VALIDATE_LOV	Validate list of values on call action code screen.
DM_FA_CALLACTIONMAINTENANCE_VIEW	View call action code.
DM_FA_CALLACTIONMAINTENANCE_VIEWALL	View all call action codes.
DM_FA_CALLACTIONMAINTENANCE_VIEWCHANGES	View collections status.
DM_FA_CASE_ACC_ASSO_HIST_NEW	Fetch history of associated accounts with case.
DM_FA_CASE_ID_FETCH	Fetch case id by account id.
DM_FA_CASE_ID_FETCH_BY_PARTY_ID	Fetch case details by party.
DM_FA_CASE_PARTY_RELATED_ACCOUNTS_FETCH	Fetch accounts related to party.
DM_FA_CASE_SEARCH	Case search.
DM_FA_CASE_SUMMARY	Fetch case summary details.
DM_FA_CASE_WIDGET_CARD_FETCH	Fetch case widget details.
DM_FA_CASE_WIDGET_CARD_FETCH_BY_CASE_ID	Fetch case widget details by case id.
DM_FA_CASE_WIDGET_CARD_FETCH_BY_CASE_NO	Fetch case widget details by case no.
DM_FA_CASE_WIDGET_COMPLETE_FETCH	Fetch details of case widget.
DM_FA_CASE_WIDGET_FETCH_BY_ACCOUNTS	Fetch case details by account.
DM_FA_CASE_WIDGET_FETCH_BY_PARTIES	Fetch case details by party.
DM_FA_CASECLOSURE_CONFIG_FACT_DETAILS	Fetch facts for case closure.
DM_FA_CHECK_SUPERVISOR	Check supervisor role of the user.
DM_FA_CLOSED_CASE_LIST	Fetch closed cases.
DM_FA_COLL_TASK_HISTORY	Task history details.
DM_FA_COLLATERAL_AMEND	Modify collateral details.

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_COLLATERAL_CHARGE_PROCESS_UPDATE	Modify collateral charges.
DM_FA_COLLATERAL_LINK_PROCESS_UPDATE	Modify collateral linkage with account.
DM_FA_COLLATERAL_OWNER_PROCESS_UPDATE	Modify collateral owner.
DM_FA_COLLATERAL_PROCESS_UPDATE	Modify collateral details.
DM_FA_COLLATERALCHARGE_AMEND	Modify collateral charge.
DM_FA_COLLATERALLINKAGE_AMEND	Modify collateral linkage with account.
DM_FA_COLLATERALOWNER_AMEND	Modify collateral owner.
DM_FA_COLLECTION_PROMISE_HISTORY	Promise history
DM_FA_COLLECTION_PTP_HISTORY	Promise history
DM_FA_COLLECTOR_TASK_HISTORY	Task history details for collector
DM_FA_COMMON_SERVICES_HEALTH_CHECK	Health check for common service
DM_FA_COMMUNICATION_AMEND	Modify communication code details
DM_FA_COMMUNICATION_AUTHORIZE	Authorize communication code
DM_FA_COMMUNICATION_AUTHQUERY	Communication template authorization
DM_FA_COMMUNICATION_CLOSE	Close communication code
DM_FA_COMMUNICATION_COPY	Copy communication code
DM_FA_COMMUNICATION_DELETE	Delete communication code
DM_FA_COMMUNICATION_DETAIL	Fetch communication details
DM_FA_COMMUNICATION_HISTORY	View communication code history
DM_FA_COMMUNICATION_NEW	Create communication code
DM_FA_COMMUNICATION_ONLOADCOMM	Fetch communications details by seed type
DM_FA_COMMUNICATION_REOPEN	Reopen communication code
DM_FA_COMMUNICATION_VALIDATE_LOV	Validate list of values in communication code screen
DM_FA_COMMUNICATION_VIEW	View communication code
DM_FA_COMMUNICATION_VIEWALL	View all communication codes
DM_FA_COMMUNICATION_VIEWCHANGES	View communication details
DM_FA_COMPLIANCE	Compliance check for the customer call
DM_FA_CONFIG_FACT_DETAILS_BY_FACT_NAMES	Fetch all config fact list
DM_FA_CORRESPONDENCE_SERVICES_HEALTH_CHECK	Health check for correspondence services
DM_FA_CURRENT_TASKS	Get current tasks on account
DM_FA_CUSTOMER_LIMITED_DETAILS_FETCH	Fetch customer details on customer widget of case summary
DM_FA_CUSTOMER_SUMMARY	Fetch customer summary
DM_FA_CUSTOMER_WIDGET_CARD_FETCH	Fetch customer widget details
DM_FA_CUSTOMER_WIDGET_CARD_FETCH_BY_CUST_ID	Fetch customer widget details by customer id
DM_FA_CUSTOMER_WIDGET_CARD_FETCH_BY_CUST_NBR	Fetch customer widget details by customer no

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_CUSTOMER_WIDGET_COMMUNICATION_DETAILS_FETCH	Fetch communication details on customer widget of case summary
DM_FA_CUSTOMER_WIDGET_EMPLOYMENT_DETAILS_FETCH	Fetch employment details on customer widget of case summary
DM_FA_DASHBOARD_GETALLKPIS	Get all key performance indicators for dashboard
DM_FA_DASHBOARD_HEALTHCHECK	Health check for dashboard service
DM_FA_DATAEXCHANGE_HEALTHCHECK	Health check for data exchange service
DM_FA_DEALLOCATEUSERBYACCTID	Remove user allocation from an account
DM_FA_DOWNLOAD_INBOUND_DOC	Download inbound document
DM_FA_ENTITY_ADD_CASEID_FOR_DEL_ACC	Add case id for a delinquent account
DM_FA_ENTITY_FACTS_AMEND	Fetch entity facts
DM_FA_ENTITY_GET_PARTY	Get party details
DM_FA_ENTITY_GETACCOUNTHISTORY	Get account history
DM_FA_ENTITY_SERVICES_HEALTH_CHECK	Health check for entity service
DM_FA_ESCALATE_TASK	Escalate task
DM_FA_FACT_DETAILS	View fact details
DM_FA_FEECHARGE_ACCOUNT_HISTORY	Get fees and charges history for an account
DM_FA_FEECHARGE_ACTIONS	Add fees and charges actions
DM_FA_FEECHARGE_AMEND	Modify fees and charges code details
DM_FA_FEECHARGE_AUTHORIZE	Authorize fees and charges code
DM_FA_FEECHARGE_AUTHQUERY	Fees and charges actions authorization
DM_FA_FEECHARGE_CLOSE	Close fees and charge code
DM_FA_FEECHARGE_COPY	Copy fees and charges code
DM_FA_FEECHARGE_DELETE	Delete fees and charges code
DM_FA_FEECHARGE_HEALTHCHECK	Health check for fees and charges code service
DM_FA_FEECHARGE_HISTORY	View fees and charges code history
DM_FA_FEECHARGE_NEW	Create fees and charges code
DM_FA_FEECHARGE_REOPEN	Reopen fees and charges code
DM_FA_FEECHARGE_VALIDATE_LOV	Validate list of values in fees and charges code
DM_FA_FEECHARGE_VIEW	View fees and charges code
DM_FA_FEECHARGE_VIEWALL	View all fees and charges codes
DM_FA_FEECHARGE_VIEWCHANGES	View fees and charges
DM_FA_FEECHARGETRANSACTION_ACCOUNT	Fetch fees and charges details by account id
DM_FA_FEEDENTITY_NEW	Add new feed entity
DM_FA_FETCH_COMM_DETAILS	Get communication details
DM_FA_FETCH_DIALER_ACCOUNTS	Fetch accounts for dialer
DM_FA_FETCH_INBOUND_DOCS	Get inbound documents
DM_FA_FETCH_STRATEGY_ASSIGN	Get strategy assignment
DM_FA_FETCH_VNDRACCASSO	Fetch vendor and account association
DM_FA_FETCHSTRATASSIGN	Fetch strategy assignment
DM_FA_FETCHSTRATASSIGNHIST	Fetch strategy assignment history
DM_FA_FETCHVENDORUSERS	Fetch vendor users
DM_FA_FILTERED_TASKS_SUMMARY_DETAILS	Get filtered task summary details

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_GET_AGENTACCOUNT	Get agent account
DM_FA_GET_AGENTACCOUNTDETAILS	Get agent account details
DM_FA_GET_AGENTPARTY	Get agent party names
DM_FA_GET_AGENTPARTYNAMES	Get agent party names
DM_FA_GET_BEHAVIOR_DTLS	Fetch customer behavioral details
DM_FA_GET_COLLATERALDATA	Fetch collateral data
DM_FA_GET_COMM_DETAILS_HIS	Get communication details history
DM_FA_GET_DIALERACCTS	Fetch dialer accounts
DM_FA_GET_EARLIESTPTP	Fetch earliest ptp details
DM_FA_GET_GROUPBASIS	Get group basis of the product processor
DM_FA_GET_OBRS_DETAILS	Fetch whatsapp template details
DM_FA_GET_PARTYIDFROMCASENO	Get party information from case
DM_FA_GET_PTP_BY_ID	Fetch ptp by id
DM_FA_GET_SETTLEMENT_COMM_DETAILS	Fetch settlement communication details
DM_FA_GET_SETTLEMENT_DETAILS	Fetch settlement details
DM_FA_GET_TASK_DETAILS_FOR_PTP	Get task details for promise creation
DM_FA_GET_TASK_DETAILS_MIGR	Fetch task details for migration
DM_FA_GET_TASK_METADATA	Fetch task meta data
DM_FA_IDENTIFIERDEFINITION_ACTIONS	Fetch identifier definition action
DM_FA_IDENTIFIERDEFINITION_AMEND	Modify identifier (auto number generation) details
DM_FA_IDENTIFIERDEFINITION_AUTHORIZE	Authorize identifier (auto number generation)
DM_FA_IDENTIFIERDEFINITION_AUTHQUERY	Identifier definition authorization
DM_FA_IDENTIFIERDEFINITION_CLOSE	Close identifier (auto number generation)
DM_FA_IDENTIFIERDEFINITION_COPY	Copy identifier (auto number generation)
DM_FA_IDENTIFIERDEFINITION_DELETE	Delete identifier (auto number generation)
DM_FA_IDENTIFIERDEFINITION_GEN_NUM	Identifier number generation
DM_FA_IDENTIFIERDEFINITION_GET_ANGCONFIG	Identifier definition configuration
DM_FA_IDENTIFIERDEFINITION_HISTORY	View identifier (auto number generation) history
DM_FA_IDENTIFIERDEFINITION_NEW	Create identifier (auto number generation)
DM_FA_IDENTIFIERDEFINITION_REOPEN	Reopen identifier (auto number generation)
DM_FA_IDENTIFIERDEFINITION_VALIDATE_LOV	Validate list of values of identifier (auto number generation)
DM_FA_IDENTIFIERDEFINITION_VIEW	View identifier (auto number generation)
DM_FA_IDENTIFIERDEFINITION_VIEWALL	View all identifiers (auto number generation)
DM_FA_IDENTIFIERDEFINITION_VIEWCHANGES	View identifier definition
DM_FA_INBOUND_DOC_UPLOAD	Case summary - inbound document upload
DM_FA_INBOUND_PROCESS_UPLOAD	Inbound account upload by feed
DM_FA_INSURANCE_AMEND	Modify insurance details
DM_FA_INSURANCE_PROCESS_UPDATE	Modify insurance process
DM_FA_KPI	Get key performance indicators of the collector
DM_FA_LOOKUPTYPE_ACTIONS	Lookup type action
DM_FA_LOOKUPTYPE_AGENTVIEW	Fetch lookup type for agent view

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_LOOKUPTYPE_AMEND	Modify lookup type code details
DM_FA_LOOKUPTYPE_AUTHORIZE	Authorize lookup type code
DM_FA_LOOKUPTYPE_AUTHQUERY	Lookup type authorization
DM_FA_LOOKUPTYPE_CLOSE	Close lookup type code
DM_FA_LOOKUPTYPE_COPY	Copy lookup type code
DM_FA_LOOKUPTYPE_DELETE	Delete lookup type code
DM_FA_LOOKUPTYPE_HISTORY	View lookup type history
DM_FA_LOOKUPTYPE_LOV	Fetch lookup type list
DM_FA_LOOKUPTYPE_NEW	Create lookup type code
DM_FA_LOOKUPTYPE_REOPEN	Reopen lookup type code
DM_FA_LOOKUPTYPE_VALIDATE_LOV	Validate list of values in lookup type screen
DM_FA_LOOKUPTYPE_VIEW	View lookup type code
DM_FA_LOOKUPTYPE_VIEWALL	View all lookup type codes
DM_FA_LOOKUPTYPE_VIEWCHANGES	View lookup type
DM_FA_NEW_AMEND_TASK_FLAG_DETAILS	Add/update task flag details
DM_FA_NEXT_TASK_STATUS	Fetch next available task status
DM_FA_NOTES_ADD	Add notes on an account
DM_FA_NOTES_BY_ACTION_ID	Fetch notes by action id
DM_FA_NOTES_GET	View notes for an account
DM_FA_NOTES_LOG_ACCT_ADDN_INFO	Fetch notes additional information
DM_FA_NOTES_SERVICES_HEALTH_CHECK	Health check for notes service
DM_FA_PARTY_ADDRESS_PROCESS_UPDATE	Modify party address
DM_FA_PARTY_AMEND	Modify party information
DM_FA_PARTY_CONTACT_DTLS_BY_ACCTID	Fetch party contact detail by account id
DM_FA_PARTY_CONTACT_PROCESS_UPDATE	Modify party contact detail
DM_FA_PARTY_EMPLOYMENT_PROCESS_UPDATE	Modify party employment detail
DM_FA_PARTY_FOR_COMM_BY_ACCTID	Fetch party details for communication by account id
DM_FA_PARTY_FOR_COMM_BY_TASKTYPE	Fetch party details for communication by task type
DM_FA_PARTY_IDENTITY_PROCESS_UPDATE	Modify party identifier details
DM_FA_PARTY_LOV_FETCH	Fetch party list
DM_FA_PARTY_NAME_PROCESS_UPDATE	Modify party name details
DM_FA_PARTY_PROCESS_UPDATE	Modify party process details
DM_FA_PARTYADDRESS_AMEND	Modify party address by party id
DM_FA_PARTYCONTACT_AMEND	Modify party contact detail by party id
DM_FA_PARTYEMPLOYMENT_AMEND	Modify party employment detail by party id
DM_FA_PARTYIDENTITY_AMEND	Modify party identifier details by party id
DM_FA_PARTYNAME_AMEND	Modify party name by party id
DM_FA_PAST_DELINQUENCY	Fetch past delinquency details of the account
DM_FA_PAST_DELINQUENCY_COUNT_FETCH	Fetch delinquency count of the account
DM_FA_PAYMENT_AMEND	Add payment details
DM_FA_PAYMENT_PROCESS_UPDATE	Add payment process

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_PRIMARY_NAME_FOR_ALL_PARTIES_FETCH	Fetch primary name for all the parties of the account
DM_FA_PRIMARY_NAME_FOR_PARTY_FETCH	Fetch primary name for the party
DM_FA_PROB_OF_COLLECTION	Add probability of collections
DM_FA_PRODUCTPROCESSOR_ACTIONS	Add product processor details
DM_FA_PRODUCTPROCESSOR_AMEND	Modify product processor code details
DM_FA_PRODUCTPROCESSOR_AUTHORIZE	Authorize product processor code
DM_FA_PRODUCTPROCESSOR_AUTHQUERY	Product processor authorization
DM_FA_PRODUCTPROCESSOR_CLOSE	Close product processor code
DM_FA_PRODUCTPROCESSOR_COPY	Copy product processor code
DM_FA_PRODUCTPROCESSOR_DELETE	Delete product processor code
DM_FA_PRODUCTPROCESSOR_GROUPBASIS_FETCH	Fetch group basis details in product processor code screen
DM_FA_PRODUCTPROCESSOR_HISTORY	View product processor code history
DM_FA_PRODUCTPROCESSOR_NEW	Create product processor code
DM_FA_PRODUCTPROCESSOR_REOPEN	Reopen product processor code
DM_FA_PRODUCTPROCESSOR_VALIDATE_LOV	Validate list of values in product processor code screen
DM_FA_PRODUCTPROCESSOR_VIEW	View product processor code
DM_FA_PRODUCTPROCESSOR_VIEWALL	View all product processor codes
DM_FA_PRODUCTPROCESSOR_VIEWCHANGES	View product processor
DM_FA_PROMISE_TO_PAY	Add promise to pay
DM_FA_PTP_ACCT_ADDN_INFO	Fetch promise to pay additional details
DM_FA_PTP_APPR	Payment appropriation for promise to pay
DM_FA_PTP_CANCELBYACCT	Case summary - cancel promise to pay
DM_FA_PTP_COUNT	Case summary - view count of promise to pay
DM_FA_PTP_CREATE	Case summary - create promise to pay
DM_FA_PTP_DETAIL_VIEW	Case summary - view active promise to pay details
DM_FA_PTP_FETCH	Case summary - fetch active promise to pay
DM_FA_PTP_HISTORY	Case summary - view promise to pay history
DM_FA_PTP_HISTORY_CANCEL_NEW	Case summary - cancel promise to pay
DM_FA_PTP_MIGRATION	Create new promise to pay for migration
DM_FA_PTP_NEW	Case summary - create promise to pay
DM_FA_PTP_REVERTCANCELPTPBYACCT	Case summary - cancel promise to pay
DM_FA_PTP_SERVICES_HEALTH_CHECK	Health check for promise to pay service
DM_FA_PTP_SIMULATE	Case summary - simulate promise to pay schedule
DM_FA_PTP_VIEW	Case summary - view promise to pay
DM_FA_PTP_WIDGET	Case summary - promise to pay widget
DM_FA_PTPTYPE_ACTIONS	Fetch promise to pay type action
DM_FA_PTPTYPE_AMEND	Modify promise type details
DM_FA_PTPTYPE_AUTHORIZE	Authorize promise type
DM_FA_PTPTYPE_AUTHQUERY	Promise to pay type authorization
DM_FA_PTPTYPE_CLOSE	Close promise type

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_PTPTYPE_COPY	Copy promise type
DM_FA_PTPTYPE_DELETE	Delete promise type
DM_FA_PTPTYPE_HISTORY	View promise type history
DM_FA_PTPTYPE_NEW	Create promise type
DM_FA_PTPTYPE_REOPEN	Reopen promise type
DM_FA_PTPTYPE_VALIDATE_LOV	Validate list of values in promise type maintenance screen
DM_FA_PTPTYPE_VIEW	View promise type
DM_FA_PTPTYPE_VIEWALL	View all promise types
DM_FA_PTPTYPE_VIEWCHANGES	View promise to pay type
DM_FA_QUICK_CASE_SEARCH	Case search - quick search
DM_FA_QUICK_LINKS	Case summary - quick links
DM_FA_REASSIGN_ACCOUNT	User assignment - reassign account
DM_FA_REASSIGN_ACCOUNTS	User assignment - reassign account
DM_FA_REASSIGN_USERS	User assignment - reassign users
DM_FA_REMOVE_TASKS_BY_ACCTID	Remove tasks by account id
DM_FA_REPAY_SCHED	Add account repayment schedule
DM_FA_RISK_IND_PROCESS_UPDATE	Add account risk indicator
DM_FA_RISKINDICATOR_AMEND	Modify risk indicators in seed data type
DM_FA_SAVE_SETTLEMENT_INIT_DETAILS	Add settlement initiation details
DM_FA_SAVE_SETTLEMENT_OFFER	Add new settlement offer
DM_FA_SEED_DESCRIPTION	Seed data description
DM_FA_SEEDDATACONFIG_ACTIONS	Fetch seed data config actions
DM_FA_SEEDDATACONFIG_AMEND	Modify seed data type details
DM_FA_SEEDDATACONFIG_AUTHORIZE	Authorize seed data type
DM_FA_SEEDDATACONFIG_AUTHQUERY	Seed data configuration authorization
DM_FA_SEEDDATACONFIG_CLOSE	Close seed data type
DM_FA_SEEDDATACONFIG_DELETE	Delete seed data type
DM_FA_SEEDDATACONFIG_HISTORY	View seed data type history
DM_FA_SEEDDATACONFIG_NEW	Create seed data type
DM_FA_SEEDDATACONFIG_REOPEN	Reopen seed data type
DM_FA_SEEDDATACONFIG_VALIDATE_LOV	Validate list of values in seed data configuration screen
DM_FA_SEEDDATACONFIG_VIEW	View seed data configuration
DM_FA_SEEDDATACONFIG_VIEWALL	View all seed data configuration
DM_FA_SEEDDATACONFIG_VIEWCHANGES	View seed data configuration changes
DM_FA_SEGMENT_ACTIONS	Fetch segment maintenance actions
DM_FA_SEGMENT_AMEND	Modify segment code details
DM_FA_SEGMENT_AUTHORIZE	Authorize segment code
DM_FA_SEGMENT_AUTHQUERY	Segment maintained authorization
DM_FA_SEGMENT_CLOSE	Close segment code
DM_FA_SEGMENT_CONFIG_FACT_DETAILS	Fetch segmentation facts
DM_FA_SEGMENT_COPY	Copy segment code

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_SEGMENT_DELETE	Delete segment code
DM_FA_SEGMENT_FACT_DETAILS	View fact details for segmentation rule
DM_FA_SEGMENT_HISTORY	View segment code history
DM_FA_SEGMENT_NEW	Create segment code
DM_FA_SEGMENT_REOPEN	Reopen segment code
DM_FA_SEGMENT_SEG_CASE_ACCOUNT_SEGMENT_MAPPING_NEW	Fetch segment account and case mapping
DM_FA_SEGMENT_VALIDATE_LOV	Validate list of values on segment maintenance screen
DM_FA_SEGMENT_VIEW	View segment code
DM_FA_SEGMENT_VIEWALL	View all segment codes
DM_FA_SEGMENT_VIEWCHANGES	View segment maintenance changes
DM_FA_SEGMENTATION_BATCH_SERVICES_HEALTH_CHECK	Health check for segmentation batch service
DM_FA_SEGMENTB_FACTS_AMEND	Fetch segmentation fact values
DM_FA_SEGMENTBATCH_FETCH_ACC	Fetch account list in segmentation batch
DM_FA_SEGMENTBATCH_FETCH_SEG	Fetch existing segments in segmentation batch
DM_FA_SEGMENTBATCH_FETCH_STGYSEGACC	Fetch segment and strategy association
DM_FA_SEGMENTBATCH_SEG_ACCOUNT_SEGMENT_MAPPING_NEW	Fetch segment codes by account id
DM_FA_SEGMENTBATCH_SEG_HIST_NEW	Update segment history
DM_FA_SEGMENTBATCH_SEG_HIST_REVERSE_NEW	Update the reversal of segment history
DM_FA_SEGMENTMAINTENANCE_SERVICES_HEALTH_CHECK	Health check for segmentation service
DM_FA_SEGMENTMAINTENANCE_SERVICES_SEGSTRATEGYMAPPING	Segment to strategy mapping service
DM_FA_SEND_COMM	Send communication
DM_FA_SETTLEMENT	Fetch settlement details
DM_FA_SETTLEMENT_FACTS	Fetch all settlement facts
DM_FA_SETTLEMENT_UPDATE_OFFER	Update settlement offers
DM_FA_SPECIALIZED_TAB_REASSIGNED	Task summary - reassign strategy on specialized tab
DM_FA_SPECIALIZED_UPDATE_STATUS	Update specialized collection status
DM_FA_SPECIALIZED_UPDATE_STATUS_POST	Update specialized collection status
DM_FA_SPECIFIC_PAYMENTS	Fetch payment details by account id
DM_FA_STRATEGY_HEALTHCHECK	Health check for strategy service
DM_FA_STRATEGYMAINTENANCE_ACTIONS	Fetch strategy maintenance details
DM_FA_STRATEGYMAINTENANCE_AMEND	Modify strategy code details
DM_FA_STRATEGYMAINTENANCE_AUTHORIZE	Authorize strategy code
DM_FA_STRATEGYMAINTENANCE_AUTHQUERY	Fetch unauthorized strategy codes
DM_FA_STRATEGYMAINTENANCE_CLOSE	Close strategy code
DM_FA_STRATEGYMAINTENANCE_COPY	Copy strategy code

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_STRATEGYMAINTENANCE_DELETE	Delete strategy code
DM_FA_STRATEGYMAINTENANCE_HISTORY	View strategy code history
DM_FA_STRATEGYMAINTENANCE_NEW	Create strategy code
DM_FA_STRATEGYMAINTENANCE_REOPEN	Reopen strategy code
DM_FA_STRATEGYMAINTENANCE_SERVICES_HEALTH_CHECK	Health check for strategy maintenance service
DM_FA_STRATEGYMAINTENANCE_SERVICES_WORKFLOWSTATUS	Fetch workflow based on task code
DM_FA_STRATEGYMAINTENANCE_VALIDATE_LOV	Validate list of values in strategy code screen
DM_FA_STRATEGYMAINTENANCE_VIEW	View strategy code
DM_FA_STRATEGYMAINTENANCE_VIEWALL	View all strategy codes
DM_FA_STRATEGYMAINTENANCE_VIEWCHANGES	View strategy codes
DM_FA_SUBORDINATE_USERS	View subordinate users of a supervisor
DM_FA_TASK_AGING	Dashboard - task aging widget
DM_FA_TASK_COMM_HIST_COUNT	Case summary - communication history widget count
DM_FA_TASK_DETAILS_BY_ID	Fetch task details by task id
DM_FA_TASK_SUMMARY_ACCOUNT_GETUSERASSIGNED	Fetch task summary details
DM_FA_TASK_SUMMARY_ACCT	View task summary -account tab
DM_FA_TASK_SUMMARY_SPECIALIZEDCASE	View task summary - specialized case tab
DM_FA_TASK_SUMMARY_TASK	View task summary
DM_FA_TASK_SUMMARY_TASK_MOBILE	View task summary on agent user interface
DM_FA_TASKAGEING	Dashboard - aging of tasks
DM_FA_TASKCOUNT	Dashboard - count of tasks
DM_FA_TASKS	Fetch task details
DM_FA_TASKTYPE_ACTIONS	Fetch task type details
DM_FA_TASKTYPE_AMEND	Modify task code details
DM_FA_TASKTYPE_AUTHORIZE	Authorize task code
DM_FA_TASKTYPE_AUTHQUERY	Fetch unauthorized task codes
DM_FA_TASKTYPE_CLOSE	Close task type code
DM_FA_TASKTYPE_COPY	Copy task code
DM_FA_TASKTYPE_DELETE	Delete task code
DM_FA_TASKTYPE_HISTORY	View task code history
DM_FA_TASKTYPE_NEW	Create task code
DM_FA_TASKTYPE_REOPEN	Reopen task code
DM_FA_TASKTYPE_VALIDATE_LOV	Validate list of values on task code screen
DM_FA_TASKTYPE_VIEW	View task code
DM_FA_TASKTYPE_VIEWALL	View all task codes
DM_FA_TASKTYPE_VIEWCHANGES	View task type codes
DM_FA_TASKWORKFLOW_ACTIONS	Fetch task workflow details
DM_FA_TASKWORKFLOW_AMEND	Modify task workflow code details

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_TASKWORKFLOW_AUTHORIZE	Authorize task workflow code
DM_FA_TASKWORKFLOW_AUTHQUERY	Fetch authorized task workflow codes
DM_FA_TASKWORKFLOW_BATCH_SERVICES_HEALTH_CHECK	Health check for task workflow batch service
DM_FA_TASKWORKFLOW_CLOSE	Close task workflow code
DM_FA_TASKWORKFLOW_COPY	Copy task workflow code
DM_FA_TASKWORKFLOW_DELETE	Delete task workflow code
DM_FA_TASKWORKFLOW_HISTORY	View task workflow history
DM_FA_TASKWORKFLOW_NEW	Create task workflow code
DM_FA_TASKWORKFLOW_REOPEN	Reopen task workflow code
DM_FA_TASKWORKFLOW_SERVICES_HEALTH_CHECK	Health check for task workflow service
DM_FA_TASKWORKFLOW_VALIDATE_LOV	Validate list of values on task workflow screen
DM_FA_TASKWORKFLOW_VIEW	View task workflow
DM_FA_TASKWORKFLOW_VIEW_BY_CODE	View task workflow codes
DM_FA_TASKWORKFLOW_VIEWALL	View list of all task workflows
DM_FA_TASKWORKFLOW_VIEWCHANGES	View changes of task workflow
DM_FA_UPCOMING_PROMISE	View upcoming promises
DM_FA_UPCOMING_PTP	View upcoming promises
DM_FA_UPDATE_FOLLOWUP_DATE	Modify follow-up date of the task
DM_FA_UPDATE_TASK_AND_FOLLOWUP_DATE	Modify follow-up date of the task
DM_FA_USERASSIGNMENT_ACTIONS	Fetch user assignment details
DM_FA_USERASSIGNMENT_AMEND	Modify user assignment code details
DM_FA_USERASSIGNMENT_AUTHORIZE	Authorize user assignment code
DM_FA_USERASSIGNMENT_AUTHQUERY	Fetch authorized user assignment codes
DM_FA_USERASSIGNMENT_CLOSE	Close user assignment code
DM_FA_USERASSIGNMENT_COPY	Copy user assignment code
DM_FA_USERASSIGNMENT_DELETE	Delete user assignment code
DM_FA_USERASSIGNMENT_HISTORY	View history of user assignment code
DM_FA_USERASSIGNMENT_NEW	Create user assignment code
DM_FA_USERASSIGNMENT_REOPEN	Re-open user assignment code
DM_FA_USERASSIGNMENT_VALIDATE_LOV	Validate list of values in assignment code screen
DM_FA_USERASSIGNMENT_VIEW	View user assignment code
DM_FA_USERASSIGNMENT_VIEWALL	View all user assignment codes
DM_FA_USERASSIGNMENT_VIEWCHANGES	View user assignment code details
DM_FA_USERGROUP_ACTIONS	View user group details
DM_FA_USERGROUP_AMEND	Modify user group details
DM_FA_USERGROUP_AUTHORIZE	Authorize user group
DM_FA_USERGROUP_AUTHQUERY	Fetch authorized user group codes
DM_FA_USERGROUP_CLOSE	Close user group
DM_FA_USERGROUP_COPY	Copy user group
DM_FA_USERGROUP_DELETE	Delete user group
DM_FA_USERGROUP_HISTORY	View history of user group

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_USERGROUP_NEW	Create user group
DM_FA_USERGROUP_REOPEN	Re-open user group
DM_FA_USERGROUP_VALIDATE_LOV	Validate list of values in user group screen
DM_FA_USERGROUP_VIEW	View user group
DM_FA_USERGROUP_VIEWALL	View all user groups
DM_FA_USERGROUP_VIEWCHANGES	View user group details
DM_FA_USERMANAGEMENT_SERVICES_HEALTH_CHECK	Health check for user management service
DM_FA_VAL_BLOCK_PERIOD	Validate block period for communication template
DM_FA_VENDORMANAGEMENT_ACTIONS	Fetch vendor maintenance details
DM_FA_VENDORMANAGEMENT_AMEND	Modify vendor details
DM_FA_VENDORMANAGEMENT_AUTHORIZE	Authorize vendor
DM_FA_VENDORMANAGEMENT_AUTHQUERY	Fetch authorized vendor details
DM_FA_VENDORMANAGEMENT_CLOSE	Close vendor
DM_FA_VENDORMANAGEMENT_COPY	Copy vendor
DM_FA_VENDORMANAGEMENT_DELETE	Delete vendor
DM_FA_VENDORMANAGEMENT_HISTORY	View vendor history
DM_FA_VENDORMANAGEMENT_NEW	Create vendor
DM_FA_VENDORMANAGEMENT_REOPEN	Reopen vendor
DM_FA_VENDORMANAGEMENT_VALIDATE_LOV	Validate list of values in vendor maintenance screen
DM_FA_VENDORMANAGEMENT_VIEW	View vendor details
DM_FA_VENDORMANAGEMENT_VIEWALL	View all vendors
DM_FA_VENDORMANAGEMENT_VIEWCHANGES	View changes for vendor
DM_FA_VENDORMGMT_HEALTHCHECK	Health check for vendor management
SMS_FA_GETCASEID	Fetch case details
SMS_FA_POST_CASEMIGRATION	Fetch case details for migration
SMS_FA_POST_COLL_STATUS_NOTES_MIGRATION	Fetch collection status for migration
SMS_FA_POST_NOTES_MIGRATION	Fetch note details for migration
DM_FA_WD_ACCOUNT_DETAILS	Fetch account widget details
DM_FA_COMMUNICATION_ACTIONS	Fetch communication actions
DM_FA_ENTITY_RUNBATCH	Run entity batch
DM_FA_PTP_RUNBATCH	Run ptp batch
DM_FA_SEGMENTATION_RUNBATCH	Run segmentation batch
DM_FA_DASHBOARD_RUNBATCH	Run dashboard batch
DM_FA_VENDORMGMT_RUNBATCH	Run vendor management batch
DM_FA_STRATEGY_RUNBATCH	Run strategy batch
DM_FA_TASK_RUNBATCH	Run task batch
DM_FA_USERMGMT_RUNBATCH	Run user management batch
DM_FA_CORRESPONDENCE_RUNBATCH	Run correspondence batch
DM_FA_FEESCHARGES_RUNBATCH	Run fees charges batch
DM_FA_DATAEXCHANGE_RUNBATCH	Run data exchange batch

Table 18-1 (Cont.) List of Functional Activity Codes

Functional Activity Code	Description
DM_FA_FASTDATA_RUNBATCH	Run fast data batch
DM_FA_SETTLEMENT_RUNBATCH	Run settlement batch

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