

Oracle® Banking Collections

Maintenance User Guide



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Contents

1	Introduction	
2	Lookups	
2.1	Create Lookup	2-1
2.1.1	Creating a Lookup	2-2
2.2	View Lookup	2-2
2.2.1	Viewing List of Lookups	2-4
3	Product Processor	
3.1	Create Product Processor	3-1
3.1.1	Creating a Product Processor	3-2
3.2	View Product Processor	3-3
3.2.1	Viewing List of Product Processors	3-4
4	Auto Number Generation	
4.1	Create Definition	4-1
4.1.1	Creating a Definition	4-3
4.2	View Definition	4-4
4.2.1	Viewing List of Definitions	4-5
5	Workflow	
5.1	Create Workflow	5-1
5.1.1	Creating a Workflow	5-2
5.2	View Workflow	5-2
5.2.1	Viewing List of Workflows	5-3
6	Task	
6.1	Create Task	6-1
6.1.1	Creating a Task	6-1

6.2	View Task	6-2
6.2.1	Viewing List of Tasks	6-3

7 Call Action

7.1	Create Call Action	7-1
7.1.1	Creating Call Action	7-2
7.2	View Call Action	7-3
7.2.1	Viewing List of Call Actions	7-4

8 Strategy

8.1	Create Strategy	8-1
8.1.1	Creating a Strategy	8-2
8.2	View Strategy	8-3
8.2.1	Viewing List of Strategies	8-4

9 Segment

9.1	Create Segment	9-1
9.1.1	Creating a Segment	9-2
9.2	View Segment	9-3
9.2.1	Viewing List of Segments	9-4

10 User Group

10.1	Create User Group	10-1
10.1.1	Creating a User Group	10-2
10.2	View User Group	10-2
10.2.1	Viewing List of User Groups	10-4

11 User Assignment

11.1	Create User Assignment	11-1
11.1.1	Creating an User Assignment	11-2
11.2	View User Assignment	11-3
11.2.1	Viewing List of User Assignments	11-4

12 Promise Type

12.1	Create Promise Type	12-1
12.1.1	Creating a Promise Type	12-2
12.2	View Promise Type	12-2

13 Seed Data

13.1	Create Seed Data	13-1
13.1.1	Creating Seed Data	13-3
13.2	View Seed Data	13-4
13.2.1	Viewing List of Seed Data	13-5

14 Communication

14.1	Create Communication	14-1
14.1.1	Creating Communication	14-2
14.2	View Communication	14-3
14.2.1	Viewing Communication	14-4

15 Fees and Charges

15.1	Create Fees and Charges	15-1
15.1.1	Creating Fees and Charges	15-2
15.2	View Fees and Charges	15-3
15.2.1	Viewing Fees and Charges	15-4

16 Functional Activity Codes

Index

Preface

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

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

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 application.

Documentation Accessibility

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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.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	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 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 who perform collection tasks and activities for a case.
- Configure user assignment based on which tasks are assigned to users.
- Create promise types that are used to create promises made by the customer to repay the due amount.

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 <i>Oracle Banking Common Core User Guide</i> .
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.

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 • Sent Letter • Sent SMS • Sent Email • Inbound Document Upload • 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 section consists of the following topic:

- [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.

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 • Sent Letter • Sent SMS • Sent Email • Inbound Document Upload • 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 section consists of the following topic:

- [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 <i>Oracle Banking Common Core User Guide</i> .
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 who perform various tasks and activities. When you create a user group, you can assign the users 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 user IDs to the user group and set active status of the users in the user group. Strategies and Tasks are assigned to only active users 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 <i>Oracle Banking Security Management System User Guide</i> .
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.
User Details	This section is used to assign users to the user group. It displays the following fields.
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 <i>Oracle Banking Security Management System User Guide</i> .

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

Field Name	Description
User Name	Displays the user name of the selected user ID.
Active	Indicates whether the user is active for the user group.

This section consists of the following topic:

- [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.
<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.
Default Assignee	Indicates whether the user group that you want to search is the default 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 section consists of the following topic:

- [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*.

User Assignment

User Assignment facilitates you to set the required configurations to assign tasks to the users 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.
Product Processor	Indicates the product processor applicable for user assignment.
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.

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

Field Name	Description
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.
Assignment Method	Indicates the assignment method. The options are: Round Robin
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 <i>Oracle Banking Common Core User Guide</i> .
User Group	This tab is used to associate user groups to the user assignment.
User Group	Indicates the user group. The list displays all the open and authorized user groups.
Description	Displays the description of the user group.
Active	Toggle to indicate whether user group association is active for the user assignment.

This section consists of the following topic:

- [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.

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

Table 11-2 (Cont.) Field Description: View User Assignment - Tile

Field Name	Description
<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.
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 section consists of the following topic:

- [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*.

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.

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%.
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 <i>Oracle Banking Common Core User Guide</i> .

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. Click **Additional Validation** tab and configure rules for promise type.
8. 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.

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

Field Name	Description
Grace Days	Displays the number of grace days of the promise type.
<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

Field Name	Description								
Seed Data Type	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								
Additional Details	This section is used to specify seed data code details for the selected seed data type.								
Code	Indicates the unique identification code of the seed data. Note: You can configure same code and description for multiple product processors, if required.								
Description	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 border="1"> <thead> <tr> <th>Code</th><th>Description</th></tr> </thead> <tbody> <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> </tbody> </table> Note: The description of code will be displayed in relevant fields across the pages based on the configurations defined.	Code	Description	SOW	Sole Owner	JAF	Joint and First	GUA	Guarantor
Code	Description								
SOW	Sole Owner								
JAF	Joint and First								
GUA	Guarantor								
Category	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.								

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 • Text 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 Text 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 <i>Oracle Banking Common Core User Guide</i> . 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. From the **Recipient** list, select the recipients of the communication.
8. From the **Execution Type** list, select the type of execution for sending communication.
9. From the **Effective Date** list, select the date from when the communication is effective.
10. In the **Subject** field, enter the subject of the email.
11. In the **Message** field, enter the message of the email.

12. 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*.

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 • Vendor 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.

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

Field Name	Description
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.
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.

Table 15-2 (Cont.) View Fees and Charges - Tile

Field Name	Description
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 Communication - 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.
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

Functional Activity Codes

The table below has a List of Functional Activity Codes.

Table 16-1 Screen v/s Functional Activity Codes

Screen Name	Functional Activity Code
Lookups	DM_FA_LOOKUPTYPE_ACTIONS DM_FA_LOOKUPTYPE_AMEND DM_FA_LOOKUPTYPE_AUTHORIZE DM_FA_LOOKUPTYPE_AUTHQUERY DM_FA_LOOKUPTYPE_CLOSE DM_FA_LOOKUPTYPE_COPY DM_FA_LOOKUPTYPE_DELETE DM_FA_LOOKUPTYPE_HISTORY DM_FA_LOOKUPTYPE_LOV DM_FA_LOOKUPTYPE_NEW DM_FA_LOOKUPTYPE_REOPEN DM_FA_LOOKUPTYPE_VALIDATE_LOV DM_FA_LOOKUPTYPE_VIEW DM_FA_LOOKUPTYPE_VIEWALL DM_FA_LOOKUPTYPE_VIEWCHANGES
Product Processor	DM_FA_PRODUCTPROCESSOR_ACTIONS DM_FA_PRODUCTPROCESSOR_AUTHORIZE DM_FA_PRODUCTPROCESSOR_AUTHQUERY DM_FA_PRODUCTPROCESSOR_CLOSE DM_FA_PRODUCTPROCESSOR_NEW DM_FA_PRODUCTPROCESSOR_DELETE DM_FA_PRODUCTPROCESSOR_AMEND DM_FA_PRODUCTPROCESSOR_REOPEN DM_FA_PRODUCTPROCESSOR_VIEW DM_FA_PRODUCTPROCESSOR_HISTORY DM_FA_PRODUCTPROCESSOR_VALIDATE_LOV DM_FA_PRODUCTPROCESSOR_VIEWALL DM_FA_PRODUCTPROCESSOR_VIEWCHANGES DM_FA_PRODUCTPROCESSOR_COPY DM_FA_PRODUCTPROCESSOR_GROUPBASIS_FETCH

Table 16-1 (Cont.) Screen v/s Functional Activity Codes

Screen Name	Functional Activity Code
Auto Number Generation	DM_FA_IDENTIFIERDEFINITION_ACTIONS DM_FA_IDENTIFIERDEFINITION_AMEND DM_FA_IDENTIFIERDEFINITION_AUTHORIZE DM_FA_IDENTIFIERDEFINITION_AUTHQUERY DM_FA_IDENTIFIERDEFINITION_CLOSE DM_FA_IDENTIFIERDEFINITION_COPY DM_FA_IDENTIFIERDEFINITION_DELETE DM_FA_IDENTIFIERDEFINITION_GEN_NUM DM_FA_IDENTIFIERDEFINITION_GET_ANGCONFIG DM_FA_IDENTIFIERDEFINITION_HISTORY DM_FA_IDENTIFIERDEFINITION_NEW DM_FA_IDENTIFIERDEFINITION_REOPEN DM_FA_IDENTIFIERDEFINITION_VALIDATE_LOV DM_FA_IDENTIFIERDEFINITION_VIEW DM_FA_IDENTIFIERDEFINITION_VIEWALL DM_FA_IDENTIFIERDEFINITION_VIEWCHANGES
Workflow	DM_FA_TASKWORKFLOW_ACTIONS DM_FA_TASKWORKFLOW_AUTHORIZE DM_FA_TASKWORKFLOW_AUTHQUERY DM_FA_TASKWORKFLOW_CLOSE DM_FA_TASKWORKFLOW_NEW DM_FA_TASKWORKFLOW_DELETE DM_FA_TASKWORKFLOW_AMEND DM_FA_TASKWORKFLOW_REOPEN DM_FA_TASKWORKFLOW_VIEW DM_FA_TASKWORKFLOW_HISTORY DM_FA_TASKWORKFLOW_VALIDATE_LOV DM_FA_TASKWORKFLOW_VIEWALL DM_FA_TASKWORKFLOW_VIEWCHANGES DM_FA_TASKWORKFLOW_VIEW_BY_CODE DM_FA_TASKWORKFLOW_COPY DM_FA_TASKWORKFLOW_SERVICES_HEALTH_CHECK

Table 16-1 (Cont.) Screen v/s Functional Activity Codes

Screen Name	Functional Activity Code
Task	DM_FA_TASKTYPE_ACTIONS DM_FA_TASKTYPE_AMEND DM_FA_TASKTYPE_AUTHORIZE DM_FA_TASKTYPE_AUTHQUERY DM_FA_TASKTYPE_CLOSE DM_FA_TASKTYPE_COPY DM_FA_TASKTYPE_DELETE DM_FA_TASKTYPE_HISTORY DM_FA_TASKTYPE_NEW DM_FA_TASKTYPE_REOPEN DM_FA_TASKTYPE_VALIDATE_LOV DM_FA_TASKTYPE_VIEW DM_FA_TASKTYPE_VIEWALL DM_FA_TASKTYPE_VIEWCHANGES
Call Action	DM_FA_CALLACTIONMAINTENANCE_ACTIONS DM_FA_CALLACTIONMAINTENANCE_AMEND DM_FA_CALLACTIONMAINTENANCE_AUTHORIZE DM_FA_CALLACTIONMAINTENANCE_AUTHQUERY DM_FA_CALLACTIONMAINTENANCE_CLOSE DM_FA_CALLACTIONMAINTENANCE_COLLSTAT_HIST_NEW DM_FA_CALLACTIONMAINTENANCE_COLLSTAT_REVERSE_NEW DM_FA_CALLACTIONMAINTENANCE_COPY DM_FA_CALLACTIONMAINTENANCE_DELETE DM_FA_CALLACTIONMAINTENANCE_GETACCTID DM_FA_CALLACTIONMAINTENANCE_GETEXISTINGCOLLSTATUS DM_FA_CALLACTIONMAINTENANCE_HISTORY DM_FA_CALLACTIONMAINTENANCE_NEW DM_FA_CALLACTIONMAINTENANCE_REOPEN DM_FA_CALLACTIONMAINTENANCE_SERVICES_HEALTH_CHECK DM_FA_CALLACTIONMAINTENANCE_VALIDATE_LOV DM_FA_CALLACTIONMAINTENANCE_VIEW DM_FA_CALLACTIONMAINTENANCE_VIEWALL DM_FA_CALLACTIONMAINTENANCE_VIEWCHANGES

Table 16-1 (Cont.) Screen v/s Functional Activity Codes

Screen Name	Functional Activity Code
Strategy	DM_FA_STRATEGYMAINTENANCE_ACTIONS DM_FA_STRATEGYMAINTENANCE_AMEND DM_FA_STRATEGYMAINTENANCE_AUTHORIZE DM_FA_STRATEGYMAINTENANCE_AUTHQUERY DM_FA_STRATEGYMAINTENANCE_CLOSE DM_FA_STRATEGYMAINTENANCE_COPY DM_FA_STRATEGYMAINTENANCE_DELETE DM_FA_STRATEGYMAINTENANCE_HISTORY DM_FA_STRATEGYMAINTENANCE_NEW DM_FA_STRATEGYMAINTENANCE_REOPEN DM_FA_STRATEGYMAINTENANCE_SERVICES_HEALTH_CHECK DM_FA_STRATEGYMAINTENANCE_SERVICES_WORKFLOWSTATUS DM_FA_STRATEGYMAINTENANCE_VALIDATE_LOV DM_FA_STRATEGYMAINTENANCE_VIEW DM_FA_STRATEGYMAINTENANCE_VIEWALL DM_FA_STRATEGYMAINTENANCE_VIEWCHANGES
Segment	DM_FA_SEGMENT_ACTIONS DM_FA_SEGMENT_AMEND DM_FA_SEGMENT_AUTHORIZE DM_FA_SEGMENT_AUTHQUERY DM_FA_SEGMENT_CLOSE DM_FA_SEGMENT_CONFIG_FACT_DETAILS DM_FA_SEGMENT_COPY DM_FA_SEGMENT_DELETE DM_FA_SEGMENT_FACT_DETAILS DM_FA_SEGMENT_HISTORY DM_FA_SEGMENT_NEW DM_FA_SEGMENT_REOPEN DM_FA_SEGMENT_SEG_CASE_ACCOUNT_SEGMENT_MAPPING_NEW DM_FA_SEGMENT_VALIDATE_LOV DM_FA_SEGMENT_VIEW DM_FA_SEGMENT_VIEWALL DM_FA_SEGMENT_VIEWCHANGES

Table 16-1 (Cont.) Screen v/s Functional Activity Codes

Screen Name	Functional Activity Code
User Group	DM_FA_USERGROUP_ACTIONS DM_FA_USERGROUP_AMEND DM_FA_USERGROUP_AUTHORIZE DM_FA_USERGROUP_AUTHQUERY DM_FA_USERGROUP_CLOSE DM_FA_USERGROUP_COPY DM_FA_USERGROUP_DELETE DM_FA_USERGROUP_HISTORY DM_FA_USERGROUP_NEW DM_FA_USERGROUP_REOPEN DM_FA_USERGROUP_VALIDATE_LOV DM_FA_USERGROUP_VIEW DM_FA_USERGROUP_VIEWALL DM_FA_USERGROUP_VIEWCHANGES
User Assignment	DM_FA_USERASSIGNMENT_ACTIONS DM_FA_USERASSIGNMENT_AMEND DM_FA_USERASSIGNMENT_AUTHORIZE DM_FA_USERASSIGNMENT_AUTHQUERY DM_FA_USERASSIGNMENT_CLOSE DM_FA_USERASSIGNMENT_COPY DM_FA_USERASSIGNMENT_DELETE DM_FA_USERASSIGNMENT_HISTORY DM_FA_USERASSIGNMENT_NEW DM_FA_USERASSIGNMENT_REOPEN DM_FA_USERASSIGNMENT_VALIDATE_LOV DM_FA_USERASSIGNMENT_VIEW DM_FA_USERASSIGNMENT_VIEWALL
Promise Type	DM_FA_PTPTYPE_ACTIONS DM_FA_PTPTYPE_AMEND DM_FA_PTPTYPE_AUTHORIZE DM_FA_PTPTYPE_AUTHQUERY DM_FA_PTPTYPE_CLOSE DM_FA_PTPTYPE_COPY DM_FA_PTPTYPE_DELETE DM_FA_PTPTYPE_HISTORY DM_FA_PTPTYPE_NEW DM_FA_PTPTYPE_REOPEN DM_FA_PTPTYPE_VALIDATE_LOV DM_FA_PTPTYPE_VIEW DM_FA_PTPTYPE_VIEWALL DM_FA_PTPTYPE_VIEWCHANGES

Table 16-1 (Cont.) Screen v/s Functional Activity Codes

Screen Name	Functional Activity Code
Seed Data	DM_FA_SEEDDATACONFIG_ACTIONS DM_FA_SEEDDATACONFIG_AMEND DM_FA_SEEDDATACONFIG_AUTHORIZE DM_FA_SEEDDATACONFIG_AUTHQUERY DM_FA_SEEDDATACONFIG_CLOSE DM_FA_SEEDDATACONFIG_DELETE DM_FA_SEEDDATACONFIG_HISTORY DM_FA_SEEDDATACONFIG_NEW DM_FA_SEEDDATACONFIG_REOPEN DM_FA_SEEDDATACONFIG_VALIDATE_LOV DM_FA_SEEDDATACONFIG_VIEW DM_FA_SEEDDATACONFIG_VIEWALL DM_FA_SEEDDATACONFIG_VIEWCHANGES
Communication	DM_FA_COMMUNICATION_AMEND DM_FA_COMMUNICATION_AUTHORIZE DM_FA_COMMUNICATION_AUTHQUERY DM_FA_COMMUNICATION_CLOSE DM_FA_COMMUNICATION_COPY DM_FA_COMMUNICATION_DELETE DM_FA_COMMUNICATION_DETAIL DM_FA_COMMUNICATION_HISTORY DM_FA_COMMUNICATION_NEW DM_FA_COMMUNICATION_ONLOADCOMM DM_FA_COMMUNICATION_REOPEN DM_FA_COMMUNICATION_VALIDATE_LOV DM_FA_COMMUNICATION_VIEW DM_FA_COMMUNICATION_VIEWALL DM_FA_COMMUNICATION_VIEWCHANGES

Table 16-1 (Cont.) Screen v/s Functional Activity Codes

Screen Name	Functional Activity Code
Fees and Charges	DM_FA_FEECHARGE_HISTORY
	DM_FA_FEECHARGE_AMEND
	DM_FA_FEECHARGE_AUTHQUERY
	DM_FA_FEECHARGE_REOPEN
	DM_FA_FEECHARGE_AUTHORIZE
	DM_FA_FEECHARGE_VIEWCHANGES
	DM_FA_FEECHARGE_VIEW
	DM_FA_FEECHARGE_VALIDATE_LOV
	DM_FA_FEECHARGE_ACTIONS
	DM_FA_FEECHARGE_DELETE
	DM_FA_FEECHARGE_NEW
	DM_FA_FEECHARGE_CLOSE
	DM_FA_FEECHARGE_VIEWALL
	DM_FA_FEECHARGE_HISTORY
	DM_FA_FEECHARGE_AMEND
	DM_FA_FEECHARGE_COPY
	DM_FA_FEECHARGE_PRINT

Index

A

Action Result, [7-1](#)
Auto Number Generation, [4-1](#)

C

Communication, [14-1](#)
Create Definition, [4-1](#)

L

Lookup, [2-1](#)

P

Product Processor, [3-1](#)
Promise Type, [12-1](#)

S

Seed Data, [13-1](#)

Segment, [9-1](#)
Strategy, [8-1](#)

T

Task, [6-1](#)

U

User Assignment, [11-1](#)
User Group, [10-1](#)

V

View Definition, [4-1](#)

W

workflow, [5-1](#)