Oracle® Banking Collections and Recovery

Transactions User Guide

Release 14.7.0.0.0
F80589-01
April 2023

Oracle Banking Collections and Recovery Transactions User Guide, Release 14.7.0.0.0

F80589-01

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Preface

This user guide helps you to perform various day to day transactions to manage a delinquent account for collections, using the transactions pages provided under **Collections and Recovery** menu.

Audience

This guide is intended for the users of Oracle Banking Collections and Recovery application.

Documentation Accessibility

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Related Resources

For more information, see these related Oracle resources:

- *Oracle Banking Collections and Recovery Getting Started User Guide*
- *Oracle Banking Collections and Recovery Maintenance User Guide*

Conventions

The following text conventions are used in this document:

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

1 Introduction

Oracle Banking Collections and Recovery facilitates you to manage the delinquent accounts and cases created on the customers of these accounts. It helps you to perform various transactions for recovery of amount due from the customers.

You can perform the following key transactions:

- Search and keep track of cases that are in Open status.
- View detailed information of cases and accounts linked to the case.
- View customer related information.
- View details of all tasks related to cases and add ad hoc tasks.
- Create and track Promise to Pay for the promises made by customer to repay the due amount.
- View list of activities performed on the accounts linked to the case.
- Create public or private notes for the accounts related to the case.
- View details of the payments received on an account.
- View list of tasks assigned to you and performs actions on the same.

2
Case Search

The **Case Search** page facilitates you to search for all the cases that are in Open status. You can quickly search for a case using the account number, customer number, or case number. You can also search for cases based on advance search criteria, such as product processor, segment, or collection status.

Using this page, you can navigate to the Case Summary page to view detailed information of a case.

Table 2-1 Field Description: Case Search

Field Name	Description
<Search By Account Number or Customer Number or Case Number>	Indicates the account number, customer number, or case number. **Note:** You must enter any one of the search criteria.
Advance Search	This section helps you to search for cases or accounts using advance search criteria. **Note:** You must specify at least one of the search criteria.
Product Processor	Indicates the product processor.
Segment	Indicates the segment associated with the case. **Note:** You can select multiple segments. If you specify segment as a search criteria, search results display only those cases for which the selected segment is active on any of the accounts linked with the case.
Overdue Amount	Indicates the range in which the overdue amount of the account exists. **Note:** You can specify both or either of the minimum and maximum overdue amount. However, maximum amount must be greater than the minimum amount specified.
Days Past Due	Indicates the range in which the number of days past due on the account exists. **Note:** You can specify both or either of the minimum and maximum number of days past due. However, maximum number of days must be greater than the minimum number of days specified.
Collection Status	Indicates the collection status. **Note:** You can select multiple collection statuses. If you specify collection status as a search criteria, search results display only those cases for which the selected collection status is active on any of the accounts linked with the case.
Sort By	Indicates the option based on which the search results should be sorted. The options are: • **Days Past Due** • **Overdue Amount** **Note:** By default, **Days Past Due** is selected.
Search Results	This section displays the search results based on specified search criteria.
Case Number	Displays the case number. Click the <Case Number> link to navigate to **Case Summary** page.
Customer Number	Displays the customer number.

Table 2-1 (Cont.) Field Description: Case Search

Field Name	Description
Customer Name	Displays name of the customer.
Account Number	Displays the account number related to the case.
Overdue Amount	Displays the overdue amount on the account.
Segment	Displays the segment to which the account is associated.
Days Past Due	Displays the days past due on the account.

2.1 Searching for Cases

You can search for all the cases that are in Open status using quick search or advance search criteria.

To search for a case:

1. From the main menu, navigate to **Collections and Recovery** and then click **Case Search.**
2. Do either of the following:
    - For quick search, enter the search criteria in the <Search By Account Number or Customer Number or Case Number> field.
    - For advance search:
        a. Click >.
        b. In the **Advance Search** section, select the product processor from **Product Processor** list.
        c. In the **Segment** field, select the segment from **Segment** list.
        d. In the **Overdue Amount** field, enter the range in which the overdue amount of the account exists.
        e. In the **Days Past Due** field, enter the range in which the number of days past due on the account exists.
        f. In the **Collection Status** field, select the collection status of the case.
        g. From the **Sort By** list, select the option based on which the search results should be sorted.
3. Click **Search.**

    The search results appear. It displays list of all open cases based on the specified search parameters.
4. In the **Case Number** column, click the <Case Number> link corresponding to the required account number to navigate to **Case Summary** page.

    The Case Summary page appears with the account in context.

3
Case Summary

This **Case Summary** page facilitates you to view and manage a case. It displays all the information related to a case and helps you to perform various tasks.

When details of delinquent accounts are received in Oracle Banking Collections and Recovery application, cases are automatically created by the system. Cases are created on the primary customer of the account.

The **Case Summary** page consists of the following widgets:

- Case
- Account
- Customer
- Quick Links
- Tasks
- Promise to Pay
- Activity

The **Quick Links** widget consists of the following action links using which you can perform various tasks:

- Notes
- Payment Details

> **Note:**
>
> You can navigate to **Case Summary** page using the Case Search page or Task Summary page.

3.1 Case

This widget displays the case specific details, such as case ID, date on which the case was created, overdue amount of all the accounts associated with the case, and status of the case.

You can view the list of accounts associated with the case and the customers associated with each account.

Table 3-1 Field Description: Case

Field Name	Description
Case	This widget displays details of the case. It displays details of the accounts associated with the case, and customers associated with the accounts.
<Case ID>	Displays the case ID.

Table 3-1 (Cont.) Field Description: Case

Field Name	Description
<Primary Customer Name>	Displays the name of the primary customer associated with the case.
Overdue Amount	Displays the total overdue amount of all the accounts associated with the case.
Score	Displays the collection score of the customer.
Creation Date	Displays the date on which the case was created.
Cases Till Date	Displays the count of all the cases that were created against the customer and closed till date.
Promise	Displays the count of all the Promise to Pay (PTP) created on the accounts associated with the case. It displays the count of PTPs in following statuses: • **Active:** Count of PTP that are active. • **Broken:** Count of PTP that were broken by the customer. • **Kept:** Count of PTP that were fulfilled by the customer.

If you click , the **Case Summary** section is displayed.

Table 3-2 Field Information: Case Summary

Field Name	Description
Case Id, <Customer Name>	Displays the case ID and name of the primary customer.
Case Details	This section displays the basic details of the case.
Case Description	Displays the description of the case.
Status	Displays the status of the case.
Creation Date	Displays the date on which the case was created.
Collection Score	Displays the collection score of the customer.
Account	This section displays the list of accounts associated with the case.
<Account Number>	Displays the account number associated with the case.
<Product Sub Type>	Displays the product sub type of the account.
Case Linkage Date	Displays the date on which account was linked to the case.
Segment	Displays all the current segments linked to the account.
Total Outstanding	Displays the total amount outstanding on the account.
Overdue Amount	Displays the overdue amount on the account.
Days Past Due	Displays the days past due on the account.
Source System	Displays the product processor from where the account is received.
Customers	This section appears if you click **Linked Customer** corresponding to an account. It displays the list of customers associated with the account.
<Customer ID>	Displays the customer ID.
<Customer Name>	Displays the name of the customer.
Relationship	Displays the relationship type of the customer with the account. For example, Joint & First.
Gender	Displays the gender of the customer.

Table 3-2 (Cont.) Field Information: Case Summary

Field Name	Description
Type	Displays the type of customer. For example, Individual.
Phone	Displays the preferred phone number of the customer.
Email	Displays the preferred email address of the customer.
Address	Displays the preferred address of the customer.

The **Customer Details** section is displayed if you click **View More** corresponding to a customer in **Customers** section. It displays detailed information about the customer.

Table 3-3 Field Description: Customer Details

Field Name	Description
Case ID, <Customer Name>	Displays the case ID and name of the customer.
Customer Details	This section displays details of the customer.
<Product Sub Type - Account Number>	Indicates the product sub type and account number. The list displays all the account numbers associated with the case.
<Account Status> < Overdue Amount>	Displays the account status and overdue amount on the account.
<Customer Name - Customer ID>	Displays the customer name and customer ID associated with the selected account. **Note:** The list displays the customer name and ID of the customers associated with the selected account. You can select the required customer name and ID to view the related details.
<Relationship>	Displays the customer's relationship with the account.
Communication Details	This tab displays communication details of the customer.
Phone	Displays the phone numbers of the customer. For example, Home Mobile, Work Mobile, and Landline Home. It also indicates if the customer has given consent to receive follow-up calls and alert messages on phone. The following icons are displayed next to a phone number: • : Hover over to view call preference details. • : Indicates that the customer has given consent to receive alert messages on the particular phone number. • : Indicates that it is the preferred phone number of the customer to receive follow-up calls.
Email	Displays the email address of the customer. For example, Home Email and Work Email. It also indicates if the customer has given E-Sign consent to receive alert emails on the electronic mailing address. It displays corresponding to the preferred email address of the customer.
Address	Displays the address details of the customer and the month and year since when the customer is located at the mentioned address.
Social Networking	Displays the social networking profile IDs of the customer. **Note:** This field is displayed only if this information is available for the customer.

Table 3-3 (Cont.) Field Description: Customer Details

Field Name	Description
Messenger	Displays the messenger ID of the customer for messaging application. **Note:** This field is displayed only if this information is available for the customer.
Call Advice	This section appears if you hover over in the **Phone** field. It displays the call preference details of the customer that helps you to decide whether you can call the customer for a follow up call at the current time.
Customer's Time	Displays the current time in the customer's time zone for the contact number. **Note:** This field does not display any details if the customer's time zone is not available.
Permission To Call	Displays whether the customer has given permission to the bank for follow up calls. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Preferred Time - Weekdays	Displays the start time and end time of the period during which the customer can be contacted during weekdays. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Preferred Time - Weekends	Displays the start time and end time of the period during which the customer can be contacted during weekends. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Do Not Disturb	Displays the Do Not Disturb (DND) start date and end date. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Employment Details	This tab displays employment details of the customer. **Note:** The companies that the customer has previously worked with are marked as **Previous** and the current company is marked as **Current.** By default, all the companies are displayed. If you want to view details of only the current employer, switch on the **Only Current Employer** toggle.
<Company Name>	Displays the name of the company. It also indicates whether the company is current or previous company of employment of the customer.

Table 3-3 (Cont.) Field Description: Customer Details

Field Name	Description
<Designation>	Displays the designation of the customer with the company. **Note:** The information for this field is displayed only if it is available.
Type	Displays the employment type of the customer. For example, Salaried and Self Employed.
Industry	Displays industry in which the customer is employed. **Note:** The information for this field is displayed only if it is available.
Start Date	Displays the start date of employment with the company.
End Date	Displays the end date of employment with the company. **Note:** The value for this field is blank for current employer.

3.2 Account

This widget displays details of the accounts associated with the customer. Based on the account in context, the widget displays various details, such as overdue amount on the account, days past due on the account, collaterals attached with the account, and the total amount outstanding on the account.

Table 3-4 Field Description: Account

Field Name	Description
<Product Sub Type - Account Number>	Indicates the product sub type and account number. The status of the account is also displayed corresponding to the selected account number. The list displays all the account numbers linked to the case. The widget displays details for the account number selected in the list.
Collection Status	Displays the collection status of the account.
Overdue Amount	Displays the overdue amount on the account.
Days Past Due	Displays the days past due on the account.
Collateral	Displays description of all the collaterals attached to the account.
Promise	Displays count of all the Promise to Pay (PTP) created on the account. It displays the count of following PTPs: • **Active:** Count of PTP that are active. • **Broken:** Count of PTP that were broken by the customer. • **Kept:** Count of PTP that were fulfilled by the customer.
Last Payment of <Amount> on <Date of Payment>	Displays the amount and date of last payment received on the account.

If you click , the **Account Summary** section is displayed.

Table 3-5 Field Description: Account Summary

Field Name	Description
Case ID, <Customer Name>	Displays the case ID and name of the customer.

Table 3-5 (Cont.) Field Description: Account Summary

Field Name	Description
Account Details	This section displays the details of the account. It displays details for the account number selected in the <Product Sub Type - Account Number> list.
<Product Sub Type - Account Number>	Indicates the product sub type and account number. The list displays all the accounts numbers linked to the case.
Overdue	Displays the overdue amount on the account.
Summary	This section displays the summary of the account.
Title	Displays the account title associated with the account number.
Days Past Due	Displays the number of days past due on the account.
Overdue Amount	Displays the overdue amount on the account.
Total Outstanding	Displays the total outstanding amount on the account.
Source System	Displays the product processor to which the account belongs.
PTP Record	Displays count of all the PTPs created on the account. It displays the count of following PTPs: • **Active:** Count of PTP that are active. • **Broken:** Count of PTP that were broken by the customer. • **Kept:** Count of PTP that were fulfilled by the customer.
Branch	Displays the name of the branch with which the account is associated.
Collection Status	Displays the collection status of the account. **Note:** If you click **View History, Collection Status** section is displayed.
Address	Displays the address where the account is located.
Past Delinquency	Displays the number of times the account has been delinquent in the past.
Additional Details	This section displays the additional details of the account.
Loan Amount	Displays the amount of loan availed on the account and the current rate of interest. **Note:** This field is displayed only for a loan account.
Last Due Date	Displays the due date of last installment. **Note:** This field is displayed only for a loan account.
Frequency	Displays the frequency of repayment of installment by the customer on the loan amount. **Note:** This field is displayed only for a loan account.
Loan Maturity Date	Displays the loan closure date as per the repayment schedule. **Note:** This field is displayed only for a loan account.
Next Installment	Displays the amount of next installment along installment due date. **Note:** This field is displayed only for a loan account.
Credit Card No	Displays the credit card number. **Note:** This field is displayed only for Credit Card account.
Card Limit	Displays the limit of credit card. **Note:** This field is displayed only for Credit Card account.
Last Due Date	Displays the due date of the last unpaid bill missed by the customer. **Note:** This field is displayed only for Credit Card account.
Account Limit	Displays the limit of account. **Note:** This field is displayed only for overdraft account and LOC account.
Limit Expiry Date	Displays the expiry date of the limit. **Note:** This field is displayed only for overdraft account and LOC account. For LOC account, you can also view the bill details.

Table 3-5 (Cont.) Field Description: Account Summary

Field Name	Description
<Bill Details>	This section appears if you click in the **Limit Expiry Date** field. **Note:** This section is displayed only for LOC account.
Bill Date	Displays the date on which the bill was raised.
Payment Due Date	Displays payment due date of the bill.
Minimum Amount Due	Displays the minimum amount due on the bill.
Total Amount Due	Displays the total amount due on the bill.
Collection Status	This section is displayed if you click **View History** in **Collection Status** field. It displays details of the collection statuses set on the account.
Status	Displays the collection status of the account.
Creation Date	Displays the date on which the collection status was set on the account.
Closed Date	Displays the date on which the collection status was closed on the account.
User	Displays the user name of the collector who updated the collection status of the account.

3.3 Customer

This widget displays details of the customers associated with the account number selected in the **Accounts** widget. It displays various customer details, such as the customer ID, phone number, address, and email.

Table 3-6 Field Description: Customer

Field Name	Description
<Customer Name>	Indicates the name of the customer. The list displays the names of the customers associated with the account selected in the **Account** widget. The customer type is displayed adjacent to the customer name.
Customer ID	Displays the customer ID and relationship type of the customer with the account.
Phone	Displays the preferred phone number of the customer. If you hover over , the **Call Advice** section appears.
SSN	Displays the social security number of the customer.
Email	Displays the preferred email address of the customer.
Address	Displays the preferred address of the customer.
Call Advice	This section appears if you hover over in the **Phone** field. It displays the call preference details of the customer that helps you to decide whether you can call the customer for a follow up call at the current time.
Customer's Time	Displays the current time in the customer's time zone for the contact number. **Note:** This field does not display any details if the customer's time zone is not available.

Table 3-6 (Cont.) Field Description: Customer

Field Name	Description
Permission To Call	Displays whether the customer has given permission to the bank for follow up calls. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Preferred Time - Weekdays	Displays the start time and end time of the period during which the customer can be contacted during weekdays. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Preferred Time - Weekends	Displays the start time and end time of the period during which the customer can be contacted during weekends. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Do Not Disturb	Displays the Do Not Disturb (DND) start date and end date. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.

If you click , the **Customer Summary** section is displayed.

Table 3-7 Field Description: Customer Details

Field Name	Description
Case ID, <Customer Name>	Displays the case ID and name of the customer.
Customer Details	This section displays details of the customer.
<Product Sub Type - Account Number>	Indicates the product sub type and account number. The list displays all the account numbers associated with the case.
<Account Status> < Overdue Amount>	Displays the account status and overdue amount on the account.

Table 3-7 (Cont.) Field Description: Customer Details

Field Name	Description
<Customer Name - Customer ID>	Displays the customer name and customer ID associated with the selected account. **Note:** The list displays the customer name and ID of the customers associated with the selected account. You can select the required customer name and ID to view the related details.
<Relationship>	Displays the customer's relationship with the account.
Communication Details	This tab displays communication details of the customer.
Phone	Displays the phone numbers of the customer. For example, Home Mobile, Work Mobile, and Landline Home. It also indicates if the customer has given consent to receive follow-up calls and alert messages on phone. The following icons are displayed next to a phone number: • : Hover over to view call preference details. • : Indicates that the customer has given consent to receive alert messages on the particular phone number. • : Indicates that it is the preferred phone number of the customer to receive follow-up calls.
Email	Displays the email address of the customer. For example, Home Email and Work Email. It also indicates if the customer has given E-Sign consent to receive alert emails on the electronic mailing address. It displays corresponding to the preferred email address of the customer.
Address	Displays the address details of the customer and the month and year since when the customer is located at the mentioned address.
Social Networking	Displays the social networking profile IDs of the customer. **Note:** This field is displayed only if this information is available for the customer.
Messenger	Displays the messenger ID of the customer for messaging application. **Note:** This field is displayed only if this information is available for the customer.
Call Advice	This section appears if you hover over in the **Phone** field. It displays the call preference details of the customer that helps you to decide whether you can call the customer for a follow up call at the current time.
Customer's Time	Displays the current time in the customer's time zone for the contact number. **Note:** This field does not display any details if the customer's time zone is not available.
Permission To Call	Displays whether the customer has given permission to the bank for follow up calls. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.

Table 3-7 (Cont.) Field Description: Customer Details

Field Name	Description
Preferred Time - Weekdays	Displays the start time and end time of the period during which the customer can be contacted during weekdays. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Preferred Time - Weekends	Displays the start time and end time of the period during which the customer can be contacted during weekends. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Do Not Disturb	Displays the Do Not Disturb (DND) start date and end date. It displays the following icons that help you to decide whether you can call the customer for a follow up call at the current time: • : Indicates that you can call the customer. • : Indicates that you cannot call the customer. **Note:** These icons are displayed only if the customer's time zone details are available.
Employment Details	This tab displays employment details of the customer. **Note:** The companies that the customer has previously worked with are marked as **Previous** and the current company is marked as **Current.** By default, all the companies are displayed. If you want to view details of only the current employer, switch on the **Only Current Employer** toggle.
<Company Name>	Displays the name of the company. It also indicates whether the company is current or previous company of employment of the customer.
<Designation>	Displays the designation of the customer with the company. **Note:** The information for this field is displayed only if it is available.
Type	Displays the employment type of the customer. For example, Salaried and Self Employed.
Industry	Displays industry in which the customer is employed. **Note:** The information for this field is displayed only if it is available.
Start Date	Displays the start date of employment with the company.
End Date	Displays the end date of employment with the company. **Note:** The value for this field is blank for current employer.

3.4 Tasks

This widget displays details of all tasks related to the account in context across all applicable segments, and the associated strategies.

You can view various details of the tasks, such as task name, task status, and follow-up date of the task. Based on the task type, you can also add various details of the task. For example, for task type as Call, you can add details of actions, results, and collection statuses. You can also quickly add ad hoc tasks for an account in context.

Any actions that you perform on tasks is displayed in the activity log in Activity widget. For example, if you modify the follow-up date of a task, the activity widget displays the activity type for the same.

Table 3-8 Field Description: Tasks

Field Name	Description
Tasks	This widget displays all tasks related to the account in context across all applicable segments, and associated strategies. It displays the count of following tasks based on various statuses: • **Not Started:** Displays the count of tasks with current status as Not Started. • **Escalated:** Displays the count of tasks with current status as Escalated. • **In Progress:** Displays the count of all tasks in any status other than Not Started, Void, Expired, and Escalated status, and the tasks that are not in final status.
Task Name	Displays the task name. Click the task name link to update details of the task. For task type as Customer Call, see Table 3-10. **Note:** The task name link is enabled only for **In Progress** and **Escalated** tasks. If you are a normal collector, the task name link is enabled only for the tasks that are assigned to you. If you are supervisor collector, the task name link is enabled for all the tasks that are assigned to you and the collectors under you.
Status	Displays the current status of the task.
Segment	Displays the segment to which the task belongs.
Follow-up Date	Displays the next follow-up date of the task. **Note:** This date is not displayed for the tasks that are in **Not Started** status and tasks that are in final status.
Start Date	Displays the date on which the task was initiated. **Note:** This date is not displayed for the tasks that are in Not Started status.
Escalation Date	Displays the date on which the task was escalated.
Assigned To	Displays the user name of the collector to whom the task is assigned.
Add Adhoc Task	This section appears if you click **Add.**
Task Name	Indicates the name of the task that you want to add.
Segment	Indicates the segment to which the task belongs.
Strategy	Indicates the strategy to which you want to associate the task.
Assigned To	Indicates the collector to which you want to assign the task.
Action	Indicates the action associated with the task.
Result	Indicates the result of the action associated with the task.
New Collection Status	Displays the new collection status that is applied on the account based on the selected action and result combination. It also displays the existing collection status that is closed on the account, if applicable.
Apply new status to all accounts	Toggle to indicate whether the new collection status should be applied on all the accounts linked to the case.

Table 3-8 (Cont.) Field Description: Tasks

Field Name	Description
Existing Collection Status	Indicates the existing collection status. **Note:** The list displays all the existing active collection statuses applied on the account till date.
Task Status	Displays the status of the task.
Follow-up Date	Indicates the next follow-up date of the task.
Apply date to all initiated tasks	Indicates whether the follow-up date is applicable to all initiated tasks.
Notes	Indicates notes related to the task.

If you click , the **Case Summary** section is displayed.

Table 3-9 Field Description: Case Summary

Field Name	Description
Case ID, <Customer Name>	Displays the case ID and name of the customer.
Task Details	This section provides the search criteria to filter records based on specific parameters.
<Product Sub Type - Account Number>	Indicates the product sub type and account number. The list displays all account numbers associated with the case. The task details appear related to the account number you select.
Overdue	Displays the overdue amount on the account.
<Segment>	Indicates the segment to which the account is associated. If account is associated with only one segment, the segment is selected and displayed by default.
<Strategy>	Indicates the strategy associated with the account and segment. If account is associated with only one strategy, the strategy is selected and displayed by default.
Tasks	This section displays the search results based on the specified search parameters.
Task Name	Displays the task name. Click the task name link to update details of the task. For task type as Customer Call, see Table 3-10. **Note:** The task name link is enabled only for the tasks that are in **In Progress** and **Escalated** status. If you are a normal collector, the task name link and check box corresponding to a task is enabled only for the tasks that are assigned to you. If you are supervisor collector, the task name link and check box corresponding to a task is enabled for all the tasks that are assigned to you and the collectors under you.
Status	Displays the current status of the task.
Segment	Displays the segment to which the task belongs.
Strategy	Displays the strategy to which the task is associated.
Follow-up Date	Displays the next follow-up date of the task. **Note:** This date is not displayed for the tasks that are in Not Started and Final status.

Table 3-9 (Cont.) Field Description: Case Summary

Field Name	Description
Start Date	Displays the date on which task was initiated. **Note:** This date is not displayed for the tasks that are in Not Started status.
Escalation Date	Displays the escalation date of the task.
Expiration Date	Displays the expiry date of the task.
Dependency	Displays the dependency of the task as maintained in **Strategy** page. Hover over the link to view dependency.
Assigned To	Displays the user name of the collector to whom the task is assigned.
History	Displays the option to view history details. If you click , the <Task History> section appears.
Date	Displays the date on which the call action details were captured.
Action	Displays the action performed on the task.
Result	Displays the result of the action performed on the task.
New Collection Status	Displays the new collection status of the task.
Existing Collection Status	Displays the existing collection status of the account.
Task Status	Displays the task status.
Follow Up Date	Displays the follow-up date of the task.

The <Customer Call Details> section appears if you click the task name link in the **Task Name** column for task type as Customer Call.

Table 3-10 Field Description: <Customer Call Details>

Field Name	Description
Action	Indicates the action related to the task. The list displays all actions that are mapped with the strategy in segment.
Result	Indicates all the results for the selected action. The list displays all the results configured for the selected action.
New Collection Status	Displays the new collection status that is applied on the account based on the selected action and result combination. It also displays the existing collection status that is closed on the account, if applicable.
Apply new status to all accounts	Toggle to indicate whether the new collection status should be applied on all the accounts linked to the case.
Existing Collection Status	Indicates the existing collection status. **Note:** The list displays all the existing collection statuses applied on the account till date.
Task Status	Indicates the next status of the task. **Note:** The list displays all the statuses to which the task can move from the current status. If the current status of the task is **Escalated**, you can move the task to any status maintained in the workflow of task.
Follow-up Date	Indicates the next follow-up date of the task. **Note:** The date should be later than or equal to the business date. The tasks are displayed in the Task Summary page based on the follow-up date specified.

Table 3-10 (Cont.) Field Description: <Customer Call Details>

Field Name	Description
Apply date to all initiated tasks	Toggle to indicate whether the follow-up date should be applied to all the initiated tasks within the same strategy.
Notes	Indicates the notes related to the task. **Note:** The notes added here are displayed as public notes with type as Task in Notes section.

3.4.1 Adding Ad hoc Tasks

You can add ad hoc tasks for any accounts associated with the case. For example, you can add ad hoc task for first notification letter sent to the customer.

To add an ad hoc task:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Task** widget, click **Add.**

   The **Add Adhoc Task** section appears.
4. From the **Task Name** list, select the task that you want to add.
5. From the **Segment** list, select the segment of the task.
6. From the **Strategy** list, select the strategy to which the task is associated.
7. From the **Assigned To** list, select the collector to which you want to assign the task.
8. From the **Action** list, select the action associated with the task.
9. From the **Result** list, select the result of the action associated with the task.
10. In the **Apply new status to all accounts** field, toggle the switch as applicable to indicate whether the new status is applicable to all accounts.
11. From the **Existing Collection Status** list, select the existing collection status of the task.
12. In the **Follow-up Date** field, select the date of follow-up for the task.
13. In the **Apply date to all initiated tasks** field, toggle the switch as applicable to indicate whether the follow-up date is applicable to all initiated tasks.
14. Click **Save.**

3.4.2 Updating Details of Call Task

You can update the details of a task, if required.

To update details of task:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Tasks** widget, click the task name link for the task that you want to update.

4. Update required details of the task.
5. Click **Save.**

3.4.3 Escalating a Task

If a task requires immediate attention, you can escalate it before the escalation date to your supervisor.

To escalate a task:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Tasks** widget, click .
4. In the **Task Details** section, specify the search parameters to search for the task that you want to escalate.
5. In the **Tasks** section, select the check box corresponding to the task and click **Escalate.**

The status of the task is updated to **ESCALATED.**

3.5 Promise to Pay

This widget facilitates you to create Promise to Pay (PTP) for the promise made by the customer to pay the overdue amount on the account. You can view details of all existing active PTP for an account. Also, you can cancel any existing active PTP, if required.

If you are normal collector, you can create PTP for the tasks that are assigned to you. However, if you are supervisor, you can create PTP for the tasks that are assigned to you or the tasks that are assigned to the collectors under you.

You can create PTP in following two ways:

- **Quick PTP:** A quick PTP facilitates you to create a PTP with minimum details to save time. You can create this PTP if the customer agrees to pay the promised amount in a single payment on a particular date.
- **Advanced PTP:** An advanced PTP facilitates you to create a PTP in detail with a payment schedule. You can create this PTP if the customer agrees to pay the promised amount in single or multiple installments over a period of time as per a payment schedule. If you create a PTP with multiple installments, each installment with the promised date and promised amount is considered as an independent PTP and needs to be tracked separately.
  Based on the configurations defined for the frequency of payments, you can create a PTP with single or multiple installments. For example, with frequency type as Ad hoc, you can create a PTP in which the promised amount is payable by the customer in a single installment. However, with frequency type as Weekly or Monthly, you can create a PTP in which the promised amount is payable by the customer in one or more installments.

Once a PTP is created, you cannot modify it. However, you can cancel an active PTP, if required. For example, you may want to cancel a PTP if it is created with incorrect details or the customer requested to cancel the PTP.

If you are normal collector, you can cancel a PTP created for the tasks that are assigned to you. However, if you are supervisor, you can cancel the PTP created for the tasks that are assigned to you or the collectors under you.

Note:

- You cannot create a PTP if an active promise already exists for a particular date. If you want to create a new PTP with the same promise date, you need to cancel the existing active PTP.
- You cannot cancel a PTP if payment appropriation is already done on that PTP.

Table 3-11 Field Description: Promise to Pay

Field Name	Description
Promise to Pay	This widget helps you to create PTP. It also displays details of the existing promises created on the account.
Task	Indicates the task for which PTP is created. **Note:** The list displays the tasks that are in **In Progress** and **Escalated** status. However, it displays only those tasks that are assigned to you. If you are a collector with supervisor role, it also displays the tasks that are assigned to the collectors under you.
Promise Type	Indicates the promise type. **Note:** The list displays only those promise types, which are: • not associated with any segments. • associated with the same segments to which the selected task is also associated. If only one promise type is applicable for the selected task based on the above rules, then that particular promise type is selected by default.
Amount	Indicates the amount that the customer has promised to pay. By default, overdue amount is displayed.
Date	Indicates the date on which customer has promised to pay the amount. **Note:** You cannot select a date prior to the business date. By default, business date is displayed.

If you click , the **Promise to Pay Summary** section is displayed.

Table 3-12 Field Description: Promise to Pay Summary

Field Name	Description
Case ID,<Customer Name>	Displays the case ID and name of the customer.
Promise To Pay Details	This section displays the details of the promise to pay created on the account.
<Product Sub Type - Account Number>	Displays the product sub type and account number.
Overdue	Displays the overdue amount on the account.
Promise	Displays the count of promises that are broken and kept for the account in context. If you click **View Details, View Promise Details** section is displayed.

Table 3-12 (Cont.) Field Description: Promise to Pay Summary

Field Name	Description
Create Promise(s)	This section is displayed if you click **Add Promise** in **Promise Details** section. It is used to specify details of the promise you want to create. If a promise is not yet created on the account, this section is displayed by default.
Task	Indicates the task for which PTP is created. **Note:** The list displays the tasks that are in **In Progress** and **Escalated** status. However, it displays only those tasks that are assigned to you. If you are a collector with supervisor role, it also displays the tasks that are assigned to the collectors under you.
Promise Type	Indicates the promise type. **Note:** The list displays only those promise types, which are: • not associated with any segments. • associated with the same segments to which the selected task is also associated. If only one promise type is applicable for the selected task based on the above rules, then that particular promise type is selected by default.
Frequency	Indicates the frequency of payment of the scheduled installments. The options are: • **Adhoc** • **Quarterly** • **Weekly** • **Fortnightly** • **Monthly**
Scheduled Repayments	Indicates the method of calculation of promised amount for the scheduled installments. The options are: • **Do Not Include:** If you select this option, then while simulating schedule the future repayment schedules or bills are not considered in calculation of promise amount. • **Include:** If you select this option, the promise amount is calculated by adding the promise amount and all the scheduled installments or bills amount falling within the promise date. The scheduled installment or bill amount should apply to the nearest PTP installment date that is greater than or equal to the scheduled installment or bill date. • **Distribute Evenly:** If you select this option, the promise amount is calculated by adding the promise amount and all the scheduled installments or bills amount falling within the PTP period. The scheduled installments or bills should be equally distributed among all the PTP installments. If you click **View Schedule, View Repayment Schedule** section is displayed.
Promise Amount	Indicates the amount that the customer has promised to pay. **Note:** By default, overdue amount is displayed.
Number of Instalments	Indicates the number of installments in which the promised amount would be paid by the customer. **Note:** If you select **Adhoc** option in **Frequency** field, this field displays **1** by default and you cannot modify it.

Table 3-12 (Cont.) Field Description: Promise to Pay Summary

Field Name	Description
Date Of First Payment	Indicates the date of first payment. **Note:** You cannot select a date prior to the business date. By default, business date is displayed.
Notes	Indicates notes related to the PTP. **Note:** This note is displayed in Notes section with type as Promise to Pay.
View Promise Details	This section appears if you click **View Details** in **Promise** field. It displays list of all past promises that are in BROKEN, KEPT, or CANCELLED status.
Promise Date	Displays date on which customer had promised to make the payment.
Promise Amount	Displays the amount that the customer promised to pay.
Received Amount	Displays the amount received on the promise to pay.
Created By	Displays the name of the user who created the promise to pay.
Created On	Displays the date on which promise to pay was created.
Status	Displays the status of the promise. The possible statuses are: • **KEPT:** Indicates that promise was fulfilled by the customer. • **BROKEN:** Indicates that promise was broken by the customer. • **CANCELLED:** Indicates that promise was canceled.
View Repayment Schedule	This section is displayed if you click **View Schedule** in **Scheduled Repayments** field. It displays the list of future scheduled payments on the account. For loan accounts, it displays the schedule payments with installment date greater than or equal to the business date. For other accounts, if displays future bills with due date greater than or equal to the business date.
S. No.	Displays the serial number.
Date	Displays the date of payment of the future installment or due date of bill.
Amount	Displays the amount of installment or the due amount on bill.
Simulate Schedule	This section is displayed once you specify details and click **Simulate.** It displays details of the payment schedule generated by the system based on the details specified. You can modify the details of the payment schedule, if required. If you click **Add Schedule,** a row is added in the table to create a new promise.
Promise Date	Displays the promise date of the PTP. **Note:** The promise date for the first PTP is the date specified in the **Date of First Payment** field. While modifying an existing installment or selecting date for a new installment, ensure that date is equal to or greater than the business date.
Promise Amount	Displays the amount of installment for the promised amount. **Note:** The promised amount for an installment is calculated based on the option selected in **Scheduled Repayments** field.
Action	Click to delete a row from the payment schedule.
Promise Details	This section displays the list of existing promises that are active.
Promise Date	Displays the promised date of payment.

Table 3-12 (Cont.) Field Description: Promise to Pay Summary

Field Name	Description
Promise Amount	Displays the amount that the customer promised to pay.
Received Amount	Displays the amount received against the PTP. If you click received amount, the transaction details of the amount is displayed.
Task	Displays the task for which promise was created.
Created By	Displays the name of the user who created the promise to pay.
Created On	Displays the date and time when the promise was created.
Action	Click **Cancel** to cancel a promise to pay. The **Reason for Cancellation** section is displayed if you click **Cancel.**
<Transaction Details>	This section is displayed if you click the link in **Received Amount** field. It displays details of all payments appropriated against the selected promise.
Transaction Date	Displays the date on which payment was received.
Transaction Type	Displays the type of transaction. The possible values: • **Credit** • **Debit**
Amount	Displays the amount appropriated against the selected promise.
Reference No.	Displays the transaction reference number.
Reason for Cancellation	This section is displayed if you click **Cancel** in **Action** field.
Reason	Indicates reason for cancellation of promise. For example, Incorrect Promise, Customer Request, and Account Cured.
Notes	Indicates notes related to cancellation of promise.

3.5.1 Creating a Quick PTP

You can create a quick PTP by specifying details, such as task, promise type, and the promised amount.

To create a quick PTP:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Promise To Pay** widget, select task from the **Task** list.
4. From the **Promise Type** list, select the promise type.
5. In the **Amount** field, enter the amount that the customer has promised to pay.
6. In the **Date** field, select the date on which customer has promised to pay the amount.
7. Click **Save PTP.**

3.5.2 Creating an Advanced PTP

You can create an advanced PTP by specifying details, such as task for which PTP is to be created, promise type, frequency of payment, promised amount, and number of installments in which the promised amount will be paid by customer.

To create an advanced PTP:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Promise To Pay** widget, click .

   The **Create Promise(s)** section is displayed if no active promises exist on the account. If active promises exist on the account, **Promise Details** section is displayed.
4. In the **Create Promise(s)** section, select task from the **Task** list.

   If **Promise Details** section is displayed, click **Add Promise** to view **Create Promise(s)** section.
5. From the **Promise Type** list, select the promise type.
6. From the **Frequency** list, select the frequency of payment of the scheduled installments.
7. From the **Scheduled Repayments** list, select the method for calculation of promised amount for the scheduled installments.
8. In the **Number of Installments** field, enter the number of installments in which the promised amount would be paid by the customer.
9. Click **Simulate** to generate the payment schedule.

   The **Simulate Schedule** section is displayed with the payment schedule generated based on the specified details. The schedule is generated based on the frequency, scheduled repayments, date of first payment, number of installments, and promise amount.
10. In the **Simulate Schedule** section, modify the details of the payment schedule, if required.
    a. In **Promise Date** field, modify the date of installment.
    b. In **Promise Amount** field, modify the amount of installment.
    c. Click **Add Schedule** to add an installment to the schedule.

       A new row is added to enter the installment details.
    d. In the **Promise Date** field, select the promise date.
    e. In the **Promise Amount** field, enter the installment amount.
11. Click **Save.**

3.5.3 Canceling a PTP

You can cancel a PTP, if required. While canceling a PTP, you must provide the reason for cancellation.

To cancel a PTP:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Promise To Pay** widget, click ⛶.
4. In the **Promise Details** section, click **Cancel** corresponding to the promise that you want to cancel.
5. In the **Reason for Cancellation** section, select the reason for cancellation from the **Reason** list.
6. Click **Save.**

3.6 Activity

This widget displays details of the activities performed on the accounts linked to the case. It displays list of activities performed by the collector or system. For example, if you make an outbound call to the customer, then details of the same are displayed.

Table 3-13 Field Description: Activity

Field Name	Description
Activity	This widget displays the details of activities performed on the account. By default, list of last five activities performed on the account are displayed. You can view more records in the **Activity Summary** section.
<Date> <User Name> <Description>	Displays the following details of an activity: • Date on which the activity was performed. • Name of the collector who performed the activity. • Description of the activity performed.

If you click ⛶, the **Activity Summary** section is displayed. By default, it displays list of all activities performed on the account in last 90 days.

Table 3-14 Field Description: Activity Summary

Field Name	Description
Case ID, <Customer Name>	Displays the case ID and name of the customer.
Activity	This section provides the search criteria to filter records.
<Product Sub Type - Account Number>	Indicates the product sub type and account number.
Overdue	Displays the overdue amount on the account.
Activity Date	Indicates the period during which the activities were performed. • **From:** Indicates the start date of the period. By default, a date is selected. The default date is calculated as 90 days before the business date. • **To:** Indicates the end date of the period. By default, the business date is selected.

Table 3-14 (Cont.) Field Description: Activity Summary

Field Name	Description
Type	Indicates the activity type. The options are: • **Assignment** • **Case** • **Collection Status** • **Contact** • **Follow-up** • **Payment** • **Promise To Pay** • **Segment** • **Task**
User Name	Indicates user name of the collector who performed the activity. The list displays user name of all the collectors who worked on the case.
Date	Displays date and time when the activity was performed.
User Name	Displays user name of the collector who performed the activity.
Type	Displays the type of activity performed.
Description	Displays the description of the activity performed.

3.6.1 Searching an Activity

You can search for activities performed on the accounts associated with the case. You can search for specific activities based on activity type, collector who performed the activity, and the period during which the activity was performed.

To search for an activity:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Activity** widget, click .
4. In the **Activity** section, select the start date of the period during which the activity was performed in the **From** field.
5. In the **To** field, select the end date of the period during which the activity was performed.
6. Click **Search.**

3.7 Notes

The **Notes** section helps you to create notes for accounts associated with a case. You can create a note as Public or Private. Public notes are visible to all collectors whereas Private notes are visible only to the collector who created the note.

Table 3-15 Field Description: Notes

Field Name	Description
Case Id,<Customer Name>	Displays the case ID and name of the customer.
Notes	This section facilitates you to create notes and view list of existing notes related to the account number.
<Product Sub Type - Account Number>	Indicates the product sub type and account number. The list displays all account numbers associated with the case. By default, the account number selected in **Account** widget is displayed.
Overdue	Displays the overdue amount on the account.
Add Note	This section helps you to create note for the selected account number.
Status	Indicates the status of the note. The options are: • **Public:** Select this option if you want the note to be visible to all collectors. • **Private:** Select this option if you want the note to be visible only to you.
Notes	Indicates description of the note.
<Existing Notes>	This section displays details of existing notes.
Date	Displays the date and time at which the note was created.
Captured By	Displays the user name of the collector who created the note.
Status	Displays the status of the note. The possible values are: • **Public** • **Private**
Type	Displays the type of note. The possible values are: • **Adhoc:** Displayed for notes created from **Notes** section. • **Task:** Displayed for notes created from **Tasks** widget. • **Promise To Pay:** Displayed for notes created from **Promise To Pay** widget.
Description	Displays the description of the note.

3.7.1 Creating a Note

You can create a note for all accounts associated with the case.

To create a note:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Quick Links** widget, click **Notes.**
4. In **Add Note** section, click the required option in the **Status** field to indicate the status.
5. In the **Notes** field, enter the description of the note.
6. Click **Save.**

Once you save the note, details of note are displayed in the list of existing notes. The notes created from this section are displayed with type as **Adhoc** in the existing notes table.

3.8 Payment Details

The **Payment Details** section facilitates you to view details of all the payment transactions of accounts related to a case. It displays payment details, such as amount, transaction type, and transaction date.

Table 3-16 Field Description: Payment Details

Field Name	Description
Case Id,<Customer Name>	Displays the case ID and name of the customer.
<Product Sub Type - Account Number>	Indicates the product sub type and account number. The list displays all account numbers associated with the case. By default, the account number selected in **Account** widget is displayed. The payment details are displayed for the account selected.
Overdue	Displays the overdue amount on the account.
Transaction Date (From - To)	Indicates the period during which the transaction date of the payments you want to search exists. • **From:** Indicates the start date of the period during which the payment was made. • **To:** Indicates the end date of the period during which the payment was made.
Payments	This section displays the list of payments for the specified period.
<Amount of Payment>	Displays the amount of payment.
Transaction Type	Displays the transaction type. The possible values are: • **Credit** • **Debit**
Transaction Date	Displays the data and time of transaction.
Reference Number	Displays the transaction reference number.
Value Date	Displays the value date of transaction.
Description	Displays the description of the transaction.

3.8.1 Searching a Payment

You can search for payment details of an account for a specific period.

To search a payment:

1. Navigate to the **Case Summary** page.
2. In the **Account** widget, select the required account from the account list.
3. In the **Quick Links** widget, click **Payments.**
4. In the **Transaction Date** field, select date in the **From** and **To** fields to specify the period for which you want to search payments.
5. Click **Search.**

4 Task Summary

The **Task Summary** page facilitates you to view summary of the tasks that are assigned to you and helps you to perform various actions on the tasks.

It provides easy access to the tasks that you need to work on. The tasks are displayed based on your user role as explained below:

- If you are a collector, it displays all the tasks assigned to you.
- If you are collector with supervisor role, it displays the tasks assigned to you and the tasks that are assigned to collectors under all user groups where you are the supervisor.

The **Task Summary** page consists of the following tabs:

- Tasks
- Account

4.1 Tasks

This tab displays summary of all the tasks assigned to you. You can search for the tasks with specific search criteria and work on tasks that need to be completed on priority. For example, you can search for tasks that are about to expire and work on the same.

You can also navigate to the **Case Summary** page to view details of the case associated with the task.

Table 4-1 Field Description: Tasks

Field Name	Description
Filter	This section helps you to filter the task list based on specific search criteria.
Follow-up Date (Until)	Indicates when is the follow-up date of task. • **Today** • **Tomorrow** • **Next 3 Days** • **Next 7 Days**
Task Type	Indicates the task type. **Note:** You can select multiple task types.
Escalation Date	Indicates the start and end date of the period in which the escalation date of the task exists. This is the date when task will be escalated by the system.
Expiration Date	Indicates the start and end date of the period in which the expiry date of the task exists. This is the date when task will expire.
User Name	Indicates user name of the collector or logged-in supervisor to whom the task is assigned. **Note:** For supervisor role, this list displays user name of the supervisor, and user name of all collectors under the supervisor. You can select multiple user names. For collector role, this field is not enabled and displays user name of the logged-in collector by default.

Table 4-1 (Cont.) Field Description: Tasks

Field Name	Description
Flag	Indicates flag of the tasks that you want to search. The options are: • **All** • **Green** • **Amber** • **Red**
Segment	Indicates the segment to which the account belongs for which the task is created. **Note:** You can select multiple segments.
Escalated	Toggle to indicate whether you want to search for tasks that are in Escalated status.
Customer ID	Indicates the customer ID associated with the account. Once you select the customer ID, customer name is displayed.
Account Number	Indicates the account number for which the task is created.
<Task List>	This section displays the search results for tasks based on specified search parameters.
Task	Displays the task name. Click the task name link to update details of the task. For task type as Call, see Table 4-2. **Note:** If A is displayed before a task name, it indicates that it is an ad hoc task.
Status	Displays status of the task.
Account Number	Displays the account number for which the task is created. If you click ⓘ, **Account Details** section is displayed.
Customer	Displays name of the primary customer associated with the account number.
Follow-up Date	Displays the follow-up date of the task.
Escalation	Displays the escalation date of the task.
Expiration	Displays the expiry date of the task.
User Assigned	Displays the user name of the collector to whom the task is assigned.
Actions	Indicates the actions that can be performed. The options are: • : Click to flag the task. • : Click to navigate to Case Summary page. If you navigate to **Case Summary** page from here, account number associated with the corresponding task is in context. You can also unflag a task using the delete option.
Account Details	This section is displayed if you click ⓘ corresponding to an account number in the **Account Number** column.
Product Type	Displays the product type.
Overdue	Displays the overdue amount on the account.
DPD	Displays the days past due on the account.
Segment	Displays the segment to which the account belongs.

Table 4-2 Field Description: <Call Details>

Field Name	Description
Action	Indicates the action related to the task. The list displays all actions that are mapped with the strategy in segment.
Result	Indicates the result for the selected action. The list displays all the results configured for the selected action.
New Collection Status	Displays the new collection status that is applied on the account based on the selected action and result combination. It also displays the existing collection status that is closed on the account, if applicable.
Apply new status to all accounts	Toggle to indicate whether the new collection status should be applied on all the accounts linked to the case.
Existing Collection Status	Indicates the existing collection status. **Note:** The list displays all the existing collection statuses applied on the account till date. If you select the action associated with any of the existing collection status, you need to select the existing collection status itself. Otherwise, select the **None** option.
Task Status	Indicates the next status of the task. **Note:** The list displays all the statuses to which the task can move from the current status. If the current status of the task is Escalated, you can move the task to any status maintained in the workflow of task.
Follow-up Date	Indicates the next follow-up date of the task. **Note:** The date should be later than or equal to the business date.
Apply date to all initiated tasks	Toggle to indicate whether the follow-up date should be applied to all the initiated tasks within the same strategy.
Notes	Indicates notes related to the task.

4.1.1 Searching for a Task

You can search for tasks with specific search criteria, such as follow-up date, task type, and expiry date.

To search for a task:

1. From the main menu, navigate to **Collections and Recovery** and then click **Task Summary.**

   The **Task Summary** page is displayed. By default, **Task** tab is displayed.
2. In the **Tasks** tab, expand the **Filter** section and enter the search criteria.
3. Click **Search.**

4.1.2 Escalating a Task

If a task requires immediate attention, you can escalate it before the escalation date to your supervisor.

To escalate a task:

1. From the main menu, navigate to **Collections and Recovery** and then click **Task Summary.**

   The **Task Summary** page is displayed. By default, **Task** tab is displayed.

2. In the **Tasks** tab, expand the **Filter** section and enter the search criteria.
3. Click **Search.**
4. In the search results, select the check box corresponding to the task that you want to escalate and click **Escalate.**

   Note: You cannot select a task which is already in Escalated status.
5. Click **Confirm.**

4.2 Account

This tab displays account-wise summary of the tasks that are assigned to you. It displays tasks related to the accounts that belong to segments where group basis is applicable and the group basis is Account.

If you are a supervisor, you can reassign account to another collector under your hierarchy. When you reassign an account to another collector, all the tasks related to the account are also assigned to the collector.

Table 4-3 Field Description: Account

Field Name	Description
Filter	This section helps you to filter the accounts based on account specific search criteria.
Segment	Indicates the segment to which the account belongs. **Note:** You can select multiple segments.
Account Number	Indicates the account number.
Days Past Due	Indicates the range within which the number of days past due for the account exists. • **Min:** Indicates the minimum number of days past due on the account. • **Max:** Indicates the maximum number of days past due on the account.
Overdue Amount	Indicates the range within which the overdue amount on the account exists. • **Min:** Indicates the minimum amount overdue on the account. • **Max:** Indicates the maximum amount overdue on the account.
Customer ID	Indicates the customer ID associated with the account. Once you select the customer ID, customer name is displayed.
User Name	Indicates user name of the collector or logged-in supervisor to whom the account is assigned. **Note:** For supervisor role, this list displays user name of the supervisor, and user name of all collectors under the supervisor. You can select multiple user names. For collector role, this field is not enabled and displays user name of the logged-in collector by default.
<Account List>	This section displays the search results for accounts based on specified search parameters.
Account Number	Displays the account number.
Customer	Displays the name of the primary customer associated with the account number.
Segment	Displays all the segments to which the account belongs.

Table 4-3 (Cont.) Field Description: Account

Field Name	Description
Due Amount	Displays the overdue amount on the account.
Product Type	Displays the product type of the account.
DPD	Displays the number of days past due on the account.
Task Not Started	Displays the number of tasks assigned to you, which are in **Not Started** status. **Note:** If you are a collector, it displays the number of tasks assigned to you. If you are supervisor, it displays the number of tasks assigned to you and the collectors under you in various user groups where you are the supervisor.
Task Escalated	Displays the number of tasks that are in **Escalated** status. **Note:** If you are a collector, it displays the number of tasks assigned to you. If you are supervisor, it displays the number of tasks assigned to you and the collectors under you in various user groups where you are the supervisor.
Task WIP	Displays the number of tasks that are in progress. This includes the tasks in any status other than Not Started, Void, Expired, and Escalated status, and the tasks that are not in final status. **Note:** If you are a normal collector, it displays the number of tasks assigned to you. If you are supervisor collector, it displays the number of tasks assigned to you and the collectors under you in various user groups where you are the supervisor.
User Assigned	Displays the user name of the collector to whom the task is assigned.
Actions	Indicates the action that can be performed. Click to navigate to Case Summary page. If you navigate to **Case Summary** page from here, the particular account number is in context.

4.2.1 Searching for Account Specific Tasks

You can search for tasks with specific search criteria, such as account number, overdue amount, and days past due on the account.

To search for account specific tasks:

1. From the main menu, navigate to **Collections and Recovery** and then click **Task Summary.**

   The **Task Summary** page is displayed. By default, **Task** tab is displayed.

2. Click the **Account** tab.
3. Expand the **Filter** section and enter the search criteria.
4. Click **Search.**

4.2.2 Reassigning Account Specific Tasks

If you are a supervisor, you can reassign accounts to any other collector within your user group. When you assign an account to another collector, all tasks associated with that particular account are assigned to the collector.

To reassign account specific task:

1. From the main menu, navigate to **Collections and Recovery** and then click **Task Summary.**

   The **Task Summary** page is displayed. By default, **Task** tab is displayed.

2. Click the **Account** tab.
3. Expand the **Filter** section and enter the search criteria.
4. Click **Search.**
5. In the search results, select the check box corresponding to the account number that you want to assign to another collector.
6. From the **Assign To User** field, select the user name of the collector to whom you want to assign the account and its associated tasks.
7. Click **Assign.**

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