

# Oracle® Banking Collections and Recovery

## Maintenance User Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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# Preface

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

- [Audience](#)
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## Audience

This guide is intended for the users of Oracle Banking Collections and Recovery 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 and Recovery Getting Started User Guide*
- *Oracle Banking Collections and Recovery Transactions User Guide*

## Conventions

The following text conventions are used in this document:

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Convention	Meaning
<b>boldface</b>	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.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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# 1

## Introduction

Oracle Banking Collections and Recovery 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
<b>Basic Information</b>	This section is used to provide the basic information of the lookup.
<b>Type</b>	Indicates the name of the lookup.
<b>Description</b>	Indicates the description of the purpose of the lookup type.
<b>System Defined</b>	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 <b>No</b> .
<b>Lookup Codes</b>	This section is used to provide lookup codes for the lookup type.
<b>Code</b>	Indicates the unique identification code for the lookup type.
<b>Description</b>	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.
<b>Sort</b>	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.
<b>System Defined</b>	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 <b>No</b> .

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

Field Name	Description
<b>Sub Code 1</b>	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.
<b>Sub Code 2</b>	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.
<b>Active</b>	Toggle to indicate whether lookup code is active.

- [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 Recovery** 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
<b>Lookup Type</b>	Displays the lookup type.
<b>Lookup Description</b>	Displays the description of the lookup.
<b>System Defined</b>	Displays whether the lookup is system defined. The possible options are: <ul style="list-style-type: none"> <li>• <b>Yes:</b> This option is displayed for the system-defined lookups.</li> <li>• <b>No:</b> This option is displayed for the user-defined lookups.</li> </ul>
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the lookup. The possible options are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Type</b>	Indicates the lookup type.
<b>Description</b>	Indicates the description of the lookup.
<b>Authorization Status</b>	Indicates the authorization status of the lookup. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a lookup with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a lookup with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a lookup with Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a lookup with Closed status.</li> </ul>
<b>System Defined</b>	Indicates whether lookup is system-defined. The options are: <ul style="list-style-type: none"> <li>• <b>Yes:</b> Select this option if you want to search for a lookup that is system-defined.</li> <li>• <b>No:</b> Select this option if you want to search for a lookup that is user-defined.</li> </ul>

- [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 Recovery** 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 and Recovery Getting Started User Guide*.

# 3

## Product Processor

A product processor helps to receive details of the delinquent accounts in Oracle Banking Collections and Recovery. 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
<b>Basic Information</b>	This section is used to provide the basic information of the product processor.
<b>Code</b>	Indicates the unique identification code of the product processor that you want to create for the host system.
<b>Description</b>	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 and Recovery application.
<b>Group Basis</b>	Indicates the option based on which system should allocate the accounts received from the product processor to the collectors. The options are: <ul style="list-style-type: none"><li>• <b>Customer:</b> Select this option if you want the accounts received to be allocated based on customer details.</li><li>• <b>Account:</b> Select this option if you want the accounts received to be allocated based on account details.</li></ul>

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

Field Name	Description
<b>Effective Date</b>	Indicates the date from when the application should accept information received from the product processor. <b>Note:</b> The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
<b>Expiry Date</b>	Indicates the date till when the application should accept information received from the product processor. <b>Note:</b> The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
<b>Populate Portfolio Company/Branch</b>	Toggle to indicate whether system should create portfolio company or branch using the Core Branch definition. <b>Note:</b> You cannot edit this field once the product processor is created.
<b>Bureau Integration</b>	Toggle to indicate whether product processor is integrated with bureau integration system.
<b>Decision Service</b>	Toggle to indicate whether product processor is integrated with decision service system.
<b>Additional Information</b>	This section is used to provide additional information of the product processor.
<b>Attribute Type</b>	Indicates the attribute type. The options are: <ul style="list-style-type: none"> <li>• <b>Module</b></li> <li>• <b>Type</b></li> <li>• <b>Sub Type</b></li> </ul>
<b>Attribute Value</b>	Indicates the attribute value. <b>Note:</b> The options in this list appear based on the option selected in <b>Attribute Type</b> field.

- [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 Recovery** 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
<b>Processor Code</b>	Displays the product processor code.
<b>Processor Description</b>	Displays the description of the product processor.
<b>Group Basis</b>	Displays the option based on which system segments the accounts received from the product processor. The possible options are: <ul style="list-style-type: none"> <li>• <b>Customer</b></li> <li>• <b>Account</b></li> </ul>
<b>Effective Date</b>	Displays the date from when the information received through the product processor in the system is effective.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the product processor. The possible values are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible values are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Processor Code</b>	Indicates the product processor code.
<b>Processor Description</b>	Indicates the description of the product processor.
<b>Group Basis</b>	Indicates the option based on which system groups the accounts received from the product processor. The options are: <ul style="list-style-type: none"><li>• <b>Customer:</b> Select this option if you want to search for product processors with group basis as Customer.</li><li>• <b>Accounts:</b> Select this option if you want to search for product processors with group basis as Account.</li></ul>
<b>Authorization Status</b>	Indicates the authorization status of the product processor. The options are: <ul style="list-style-type: none"><li>• <b>Authorized:</b> Select this option if you want to search for a product processor with Authorized status.</li><li>• <b>Unauthorized:</b> Select this option if you want to search for a product processor with Unauthorized status.</li></ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"><li>• <b>Open:</b> Select this option if you want to search for a product processor with Open status.</li><li>• <b>Closed:</b> Select this option if you want to search for a product processor with Closed status.</li></ul>

- [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 Recovery** 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 and Recovery 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
<b>Product Processor</b>	Indicates the product processor. The auto numbers are generated for the accounts received from the selected product processor.
<b>Branch</b>	Indicates the branch name. The auto numbers are generated for the accounts of the selected branch.
<b>Entity Type</b>	Indicates the entity type for which the auto number should be generated using the definition. The option is <b>Case</b> . By default, the option selected is <b>Case</b> . 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.
<b>User Sequence # Reset Frequency</b>	Indicates the frequency at which the system should reset the auto number generation logic for an entity type. The options are: <ul style="list-style-type: none"><li>• <b>Annual</b></li><li>• <b>None</b></li><li>• <b>Monthly</b></li><li>• <b>Weekly</b></li><li>• <b>Daily</b></li><li>• <b>Semi-Annual</b></li><li>• <b>Quarterly</b></li></ul>

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

Field Name	Description
<b>Max Length</b>	Indicates the maximum length of the number that is generated.
<b>Length</b>	<p>Toggle to indicate whether system should generate number with variable or fixed length.</p> <p>If <b>Variable</b> is selected, system generates number that is of variable length but up to the maximum length specified in the <b>Max Length</b> field.</p> <p>If <b>Fixed</b> is selected, system generates number equal to the maximum length specified in the <b>Max Length</b> field.</p>
<b>Add Check Digit</b>	<p>Toggle to indicate whether system should add a check digit at the end of the auto number generated for the selected entity type.</p> <p><b>Note:</b> 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 <b>Max Length</b> field.</p>
<b>&lt;Unit Details&gt;</b>	This section is used to specify what the number should constitute and the sequence of the same in the auto number to be generated.
<b>Sequence</b>	<p>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.</p> <p>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.</p>
<b>Units</b>	<p>Indicates the unit with which the system should generate the number. The options are:</p> <ul style="list-style-type: none"> <li>• <b>Record Creation Year (YYYY)</b></li> <li>• <b>Record Creation (DD)</b></li> <li>• <b>Record Creation Year/Month (YYYYMM)</b></li> <li>• <b>Random Number &gt; Length</b></li> <li>• <b>Record Creation Year (YY)</b></li> <li>• <b>System Sequence Number &gt; Length</b></li> <li>• <b>User Sequence Number &gt; Length</b></li> <li>• <b>Record Creation Month (MM)</b></li> <li>• <b>Constant</b></li> </ul> <p>For example, if you select <b>Constant</b> and specify AN as the value in the <b>Value</b> field with sequence as 1 for entity type as <b>Case</b>. In this scenario, auto number generated for all the case numbers will start with AN as a constant value.</p> <p><b>Note:</b> This list displays options based on the selected entity type. By default, <b>Constant</b> is selected.</p> <p>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 <b>Max Length</b> field.</p> <p>It is mandatory to add and enable the <b>System Sequence Number &gt; Length</b> unit. And it must be numbered last in the sequence if more than one units are added.</p>

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

Field Name	Description
<b>Value</b>	<p>Indicates or displays the length of the unit. For the following options in the <b>Unit</b> field, it displays the values by default and you cannot edit the same.</p> <ul style="list-style-type: none"> <li>• <b>Record Creation Year (YYYY)</b></li> <li>• <b>Record Creation (DD)</b></li> <li>• <b>Record Creation Year/Month (YYYYMM)</b></li> <li>• <b>Record Creation Year (YY)</b></li> <li>• <b>Record Creation Month (MM)</b></li> </ul> <p><b>Note:</b> 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 <b>Max Length</b> field.</p>
<b>Enabled</b>	<p>Toggle to indicate whether the unit is active. <b>Note:</b> System uses only the active units for generating auto numbers.</p>

- [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 Recovery** 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
<b>Entity Type</b>	Displays the entity type.
<b>Product Processor</b>	Displays the product processor code.
<b>Branch</b>	Displays the name of the branch.
<b>Sequence Reset</b>	Displays the frequency of reset for auto number generation logic for an entity type.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the definition. The possible values are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>

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

Field Name	Description
<Record Status>	Displays the status of the record. The possible values are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Product Processor</b>	Indicates the product processor code.
<b>Entity Type</b>	Indicates the entity type. The options are: <ul style="list-style-type: none"> <li>• <b>Case</b></li> <li>• <b>Strategy</b></li> <li>• <b>Task</b></li> <li>• <b>Segment</b></li> </ul>
<b>Branch</b>	Indicates the name of the branch.
<b>Authorization Status</b>	Indicates the authorization status of the definition. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a definition with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a definition with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a definition in Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a definition in Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery 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
<b>Basic Details</b>	This section is used to provide basic information of the workflow.
<b>Code</b>	Indicates the unique identification code of the workflow.
<b>Description</b>	Indicates the description of the workflow.
<b>Status Details</b>	This section is used to provide the status transition details of the task.  <b>Note:</b> 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> .
<b>S.No.</b>	Displays the serial number of the status transition record.
<b>Current Status</b>	Indicates the current workflow status of the task. <b>Note:</b> The current status and next status cannot be same.
<b>Next Status</b>	Indicates the next workflow status to which the task should move. <b>Note:</b> The current status and next status cannot be same.
<b>Type</b>	Indicates how the status transition should happen. The options are: <ul style="list-style-type: none"><li>• <b>Manual:</b> Select this option if you want the status transition to be done manually by the user.</li><li>• <b>System:</b> Select this option if you want the status transition to be done by the system.</li></ul> <b>Note:</b> The status transition of type as <b>System</b> can also be done manually by the collector.
<b>Active</b>	Toggle to indicate whether the status transition is active.

- [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 Recovery** 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
<b>Workflow Code</b>	Displays the workflow code.
<b>Workflow Description</b>	Displays the description of the workflow.
<b>Authorization Status</b>	Displays the authorization status of the workflow. The possible options are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>Record Status</b>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Workflow Code</b>	Indicates the workflow code.
<b>Workflow Description</b>	Indicates the workflow description.
<b>Authorization Status</b>	Indicates the authorization status of the workflow. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a workflow with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a workflow with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a workflow in Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a workflow in Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery 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
<b>Task Type</b>	Indicates the task type. The options are: <ul style="list-style-type: none"><li>• <b>Customer Call</b></li><li>• <b>Sent Letter</b></li><li>• <b>Sent SMS</b></li><li>• <b>Sent Email</b></li><li>• <b>Inbound Document Upload</b></li><li>• <b>Manual Review</b></li></ul>
<b>Task Code</b>	Indicates the unique identification code of the task type.
<b>Task Description</b>	Indicates the description of the task.
<b>Workflow</b>	Indicates the workflow of the task.

- [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 Recovery** 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. 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
<b>Task Code</b>	Displays the task code.
<b>Task Description</b>	Displays the description of the task.
<b>Type</b>	Displays the task type.
<b>Workflow</b>	Displays the task workflow.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the task. The possible options are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Task Type</b>	Indicates the task type. The options are: <ul style="list-style-type: none"> <li>• Customer Call</li> <li>• Sent Letter</li> <li>• Sent SMS</li> <li>• Sent Email</li> <li>• Inbound Document Upload</li> <li>• Manual Review</li> </ul>
<b>Task Code</b>	Indicates the task code.
<b>Task Description</b>	Indicates the description of the task.
<b>Authorization Status</b>	Indicates the authorization status of the task. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a task with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a task with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a task in Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a task in Closed status.</li> </ul>

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

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


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

- [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 Recovery** 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
<b>Action Code</b>	Displays the call action code
<b>Action Description</b>	Displays the description of the call action.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the call action. The possible options are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Code</b>	Indicates the call action code.
<b>Description</b>	Indicates the description of the call action.
<b>Authorization Status</b>	Indicates the authorization status of the call action. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a call action with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a call action with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a call action with Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a call action with Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery 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
<b>Basic Details</b>	This section is used to provide basic information of the strategy.
<b>Code</b>	Indicates the unique identification code of the strategy.
<b>Description</b>	Indicates the description of the strategy.
<b>Effective Date</b>	Indicates the date from when the strategy is effective in the system. <b>Note:</b> The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
<b>Expiry Date</b>	Indicates the date till when the strategy is effective in the system. <b>Note:</b> The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
<b>Task Details</b>	This section is used to add the tasks that you want to group together under the strategy, and set the task related configurations.
<b>S. No</b>	Indicates the sequence number of performance of task.
<b>Task</b>	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.
<b>Mandatory</b>	Toggle to indicate whether it is mandatory to perform the current task before proceeding to perform the next task in sequence.
<b>Wait Period (Days:Hours:Mins)</b>	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. <b>Note:</b> This field is enabled only for mandatory tasks.
<b>Escalation (Days:Hours:Mins)</b>	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.
<b>Expiration (Days:Hours:Mins)</b>	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
<b>Dependency</b>	<p>Click <b>Add</b> 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 <b>Add</b>, the <b>Dependency</b> 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.</p> <p><b>Note:</b> This field is not applicable for the first task in sequence. You can add dependent task from second task onwards in the sequence.</p>
<b>Template</b>	<p>Click  to add correspondence template for the task.</p> <p><b>Note:</b> You can add multiple correspondence templates for a task. However, you need to mark one template as default.</p>



- [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 Recovery** 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
<b>Strategy Code</b>	Displays the strategy code.
<b>Strategy Description</b>	Displays the description of the strategy.
<b>Effective Date</b>	Displays the date from when the strategy is effective in the system.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the strategy. The possible options are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Strategy Code</b>	Indicates the strategy code.
<b>Strategy Description</b>	Indicates the description of the strategy.

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


Field Name	Description
<b>Authorization Status</b>	Indicates the authorization status of the strategy. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a strategy with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a strategy with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a strategy in Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a strategy in Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery Getting Started User Guide*.

# 9

## Segment

In Oracle Banking Collections and Recovery, 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
<b>Basic Details</b>	This section is used to provide basic information of the segment.
<b>Code</b>	Indicates the unique identification code of the segment.
<b>Description</b>	Indicates description of the segment.
<b>Product Processor</b>	Indicates the product processor applicable for the segment.
<b>Group Basis</b>	Displays the group basis of the product processor that is applicable on the segment. The possible values are: <ul style="list-style-type: none"><li>• <b>Account</b></li><li>• <b>Customer</b></li></ul> The group basis is displayed as per configurations defined for the selected product processor. <b>Note:</b> The value in this field is displayed once you select the product processor.

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

Field Name	Description
<b>Ignore Group Basis</b>	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. <b>Note:</b> If the switch is enabled, the allocation of tasks is done based on the user assignment code selected in the <b>User Assignment</b> field in <b>Strategy</b> tab.
<b>Effective Date</b>	Indicates the date from when the segment is effective in the system. <b>Note:</b> The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
<b>Expiry Date</b>	Indicates the date till when the segment is effective in the system. <b>Note:</b> The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
<b>Selection Criteria</b>	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> .
<b>Strategy</b>	This tab is used to associate strategies that are applicable on the segment. <b>Note:</b> You can associated one or more strategies with the segment.
<b>S.No</b>	Displays the sequence number of the strategy.
<b>Strategy</b>	Indicates the strategy associated with the segment.
<b>User Assignment</b>	Indicates the user assignment code based on which all the tasks related to the strategies are allocated to the users. <b>Note:</b> This field is displayed only if <b>Ignore Group Basis</b> switch is turned on.
<b>Call Details</b>	Indicates the call action applicable for the strategy.
<b>Enabled</b>	Toggle to indicate whether the strategy is enabled for the segment.

**Related Topics**

For more information on...	See...
How to create user assignment	<a href="#">Creating an User Assignment</a>

- [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 Recovery** 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
<b>Segment Code</b>	Displays the segment code.
<b>Segment Description</b>	Displays the description of the segment.
<b>Product Processor</b>	Displays the product processor for the segment.
<b>Group Basis</b>	Displays the group basis of the segment. The possible values are: <ul style="list-style-type: none"> <li>• <b>Customer</b></li> <li>• <b>Account</b></li> </ul>

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

Field Name	Description
<Authorization Status>	Displays the authorization status of the segment. The possible values are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<Record Status>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Segment Code</b>	Indicates the segment code.
<b>Segment Description</b>	Indicates the description of the segment.
<b>Authorization Status</b>	Indicates the authorization status of the segment. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a segment with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a segment with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a segment in Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a segment in Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery 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
<b>Basic Details</b>	This section is used to provide the basic information of the user group.
<b>Code</b>	Indicates the unique identification code of the user group.
<b>Description</b>	Indicates the description of the user group.
<b>Hierarchy Order</b>	Indicates the order of the user group in the hierarchy of user groups. <b>Note:</b> 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.
<b>Supervisory Group</b>	Indicates the supervisor group for the user group. <b>Note:</b> 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> .
<b>Default Assignee</b>	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. <b>Note:</b> 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.
<b>User Details</b>	This section is used to assign users to the user group. It displays the following fields.
<b>User ID</b>	Indicates the unique identification code of the user that you want to assign to the user group. <b>Note:</b> 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
<b>User Name</b>	Displays the user name of the selected user ID.
<b>Active</b>	Indicates whether the user is active for the user group.

- [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 Recovery** 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
<b>Code</b>	Displays the user group code.
<b>Description</b>	Displays the description of the user group.
<b>Supervisory Group</b>	Displays the supervisor group for the user group.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the user group. The possible options are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Code</b>	Indicates the user group code.
<b>Description</b>	Indicates the description of the user group.
<b>Supervisory Group</b>	Indicates the supervisor group of the user group.
<b>Default Assignee</b>	Indicates whether the user group that you want to search is the default group.
<b>Authorization Status</b>	Indicates the authorization status of the user group. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a user group with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a user group with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a user group in Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a user group in Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery Getting Started User Guide*.

# 11

## 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
<b>Basic Details</b>	This section is used to provide basic information of the user assignment.
<b>Code</b>	Indicates the unique identification code of the user assignment.
<b>Description</b>	Indicates the description of the user assignment.
<b>Priority</b>	Indicates the priority for execution of the user assignment. <b>Note:</b> Priority must be unique for each user assignment. This field is disabled if <b>Ignore Group Basis</b> switch is turned on.
<b>Product Processor</b>	Indicates the product processor applicable for user assignment.
<b>Group Basis</b>	Displays the group basis. The possible options are: <ul style="list-style-type: none"><li>• <b>Account</b></li><li>• <b>Customer</b></li></ul> <b>Note:</b> The group option appears as defined for the selected product processor. If the grouping option is <b>Account</b> , 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 <b>Customer</b> 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
<b>Ignore Group Basis</b>	Toggle to indicate whether group basis is ignored for user assignment. <b>Note:</b> If the toggle switch is enabled, then: <ul style="list-style-type: none"> <li>configurations set for rules in <b>Selection Criteria</b> tab are not applicable.</li> <li>grouping basis of customer or account is ignored and tasks are assigned to various collectors based on skills and expertise.</li> </ul>
<b>Assignment Method</b>	Indicates the assignment method. The options are: <ul style="list-style-type: none"> <li><b>Round Robin</b></li> </ul>
<b>Effective Date</b>	Indicates the date from when the user assignment is effective in the system. <b>Note:</b> The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
<b>Expiry Date</b>	Indicates the date till when the user assignment is effective in the system. <b>Note:</b> The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.
<b>Selection Criteria</b>	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> .
<b>User Group</b>	This tab is used to associate user groups to the user assignment.
<b>User Group</b>	Indicates the user group. The list displays all the open and authorized user groups.
<b>Description</b>	Displays the description of the user group.
<b>Active</b>	Toggle to indicate whether user group association is active for the user assignment.

- [Creating an User Assignment](#)

### 11.1.1 Creating an User Assignment

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

#### To create an user assignment:

Ensure that user groups are created in the system.

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

The **Create User Assignment** page appears.

3. In the **Code** field, enter a unique identification code for the user assignment.
4. In the **Description** field, enter a description of the user group.
5. In the **Priority** field, enter the priority of the user assignment.
6. From the **Product Processor** list, select the product processor.
7. From the **Assignment Method** list, select the assignment method.

8. In the **Effective Date** field, enter the date from when the user assignment is effective in the system.
9. In the **Selection Criteria** tab, configure rules for user assignment.
10. In the **User Group** tab, enter the required details to associate user groups to the user assignment.
11. Click **Save**.

A message appears that the record is saved successfully.

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

## 11.2 View User Assignment

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


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

You can perform the following actions:

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

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

Field Name	Description
<b>Code</b>	Displays the user assignment code.
<b>Description</b>	Displays the description of the user assignment.
<b>Assignment Method</b>	Displays the assignment method.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the user assignment. The possible values are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible values are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Code</b>	Indicates the user assignment code.
<b>Description</b>	Indicates the description of the user assignment.
<b>Ignore Group Basis</b>	Toggle to indicate whether group basis is ignored for user assignment records that you want to search.
<b>Assignment Method</b>	Indicates the assignment method.
<b>Authorization Status</b>	Indicates the authorization status of the user assignment. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for an user assignment with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for an user assignment with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for an user assignment in Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for an user assignment in Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery Getting Started User Guide*.

# 12

## Promise Type

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

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

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

- [Create Promise Type](#)
- [View Promise Type](#)

### 12.1 Create Promise Type

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

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

**Table 12-1 Field Description: Create Promise Type**

Field Name	Description
<b>Basic Details</b>	This section is used to provide basic information of the promise type.
<b>Code</b>	Indicates the unique identification code of the promise type.
<b>Description</b>	Indicates the description of the promise type.
<b>Segment</b>	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.
<b>Grace Days</b>	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.
<b>Threshold (%)</b>	Indicates the threshold limit in percentage of the promised amount. <b>Note:</b> The limit should not be greater than 100%.
<b>Additional Validation</b>	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> .

- [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 Recovery** 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
<b>Code</b>	Displays the promise type code.
<b>Description</b>	Displays the description of the promise type.

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

Field Name	Description
<b>Grace Days</b>	Displays the number of grace days of the promise type.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the promise type. The possible options are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Code</b>	Indicates the promise type code.
<b>Description</b>	Indicates the description of promise type.
<b>Authorization Status</b>	Indicates the authorization status of the promise type. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a promise type with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a promise type with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a promise type in Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a promise type in Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery 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 and Recovery, 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 and Recovery, 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								
<b>Seed Data Type</b>	<p>Indicates the seed data type for which you want to create seed data. The options are:</p> <ul style="list-style-type: none"> <li>• <b>Arrear Type</b></li> <li>• <b>Asset Class</b></li> <li>• <b>Collateral Realization Status</b></li> <li>• <b>Collateral Type</b></li> <li>• <b>Contact</b></li> <li>• <b>Document Type</b></li> <li>• <b>Employment Type</b></li> <li>• <b>Gender</b></li> <li>• <b>Identification</b></li> <li>• <b>Industry Type</b></li> <li>• <b>Marital Status</b></li> <li>• <b>Name Type</b></li> <li>• <b>Party Type</b></li> <li>• <b>Product Code</b></li> <li>• <b>Product Sub-Type</b></li> <li>• <b>Product Type</b></li> <li>• <b>Relationship</b></li> <li>• <b>Risk Indicators</b></li> <li>• <b>System Account Status</b></li> </ul>								
<b>Additional Details</b>	This section is used to specify seed data code details for the selected seed data type.								
<b>Code</b>	<p>Indicates the unique identification code of the seed data.  <b>Note:</b> You can configure same code and description for multiple product processors, if required.</p>								
<b>Description</b>	<p>Indicates the description of the code.            For example, if you want to create seed data for seed data type as <b>Relationship</b>, you can add the seed data codes with description as given below:</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <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> <p><b>Note:</b> The description of code will be displayed in relevant fields across the pages based on the configurations defined.</p>	Code	Description	SOW	Sole Owner	JAF	Joint and First	GUA	Guarantor
Code	Description								
SOW	Sole Owner								
JAF	Joint and First								
GUA	Guarantor								
<b>Category</b>	<p>Indicates the category of contact type. The options are:</p> <ul style="list-style-type: none"> <li>• <b>Phone</b></li> <li>• <b>Address</b></li> <li>• <b>EMAIL</b></li> <li>• <b>Messaging</b></li> <li>• <b>SNP</b></li> </ul> <p><b>Note:</b> This field is displayed only if you select <b>Contact</b> in <b>Seed Data Type</b> field.</p>								

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

Field Name	Description
<b>Primary</b>	Toggle to indicate whether the specified name type is primary. <b>Note:</b> You must configure at least one name type as primary for a product processor. This field is displayed only if you select <b>Name Type</b> in the <b>Seed Data Type</b> field.
<b>Primary Party</b>	Toggle to indicate whether the specified relationship is the primary party. <b>Note:</b> You must configure at least one relationship as primary party for a product processor. This field is displayed only if you select <b>Relationship</b> in the <b>Seed Data Type</b> field.
<b>Product Type</b>	Indicates the product type. For example, loans, overdraft, and credit card. <b>Note:</b> This field is displayed only if you select <b>Product Type</b> in the <b>Seed Data Type</b> field.
<b>Product Processor Mapping</b>	This section appears if you click  corresponding to a row in the <b>Additional Details</b> 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.
<b>Product Processor Value</b>	Indicates the product processor to which you want to associate the seed data. Indicates the corresponding value received from the product processor for the configured seed data code. The value that you enter in the <b>Code</b> 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 and Recovery. These seed data details are used in transactions and displayed across the pages based on configurations defined.
<b>Comment</b>	Indicates any comments related to the product processor.

- [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 Recovery** 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
<b>Seed Data Type</b>	Displays the seed data type.
<b>Total Number of Codes</b>	Displays the total number of codes defined for the seed data type.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the seed data. The possible options are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>

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

Field Name	Description
<Record Status>	Displays the status of the record. The possible options are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Seed Data Type</b>	Indicates the seed data type.
<b>Authorization Status</b>	Indicates the authorization status of the seed data. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a seed data with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a seed data with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a seed data with Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a seed data with Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery 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
<b>Mode</b>	Indicates the mode of communication. The options are: <ul style="list-style-type: none"><li>• <b>Letter</b></li><li>• <b>Email</b></li><li>• <b>Text Message</b></li></ul>
<b>Code</b>	Indicates the unique identification code of the communication.
<b>Description</b>	Indicates the description of the communication.
<b>Purpose</b>	Indicates purpose of the communication. For example, bankruptcy, delinquency, and legal.
<b>Advice</b>	Indicates template for the attachment that should be sent to the customer along with the communication. <b>Note:</b> This field is displayed only if you select <b>Email</b> or <b>Letter</b> in the <b>Mode</b> field.
<b>Recipient</b>	Indicates the recipients of the communication. You can select multiple recipients for a communication.
<b>Block Period (in Days)</b>	Indicates the number of days for block period.
<b>Applicability</b>	Indicates applicability of the communication. By default, <b>Customer</b> is selected. <b>Note:</b> This field is displayed only if you select <b>Email</b> or <b>Text Message</b> in <b>Mode</b> field.
<b>Execution Type</b>	Indicates the execution type for sending communication. The options are: <ul style="list-style-type: none"><li>• <b>Batch</b></li><li>• <b>Manual</b></li></ul>
<b>Effective Date</b>	Indicates the date from when the communication is effective in the system. <b>Note:</b> The date should be later than or equal to the business date. However, it must be earlier than or equal to the expiry date.
<b>Expiry Date</b>	Indicates the date till when the communication is effective in the system. <b>Note:</b> The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.

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

Field Name	Description
<b>Subject</b>	Indicates the template for subject of the email. You can define the subject to send dynamic values for emails. <b>Note:</b> This field is enabled only if you select <b>Email</b> option in the <b>Mode</b> field.
<b>Message</b>	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. <b>Note:</b> This field is enabled only if you select <b>Email</b> or <b>Text Message</b> option in the <b>Mode</b> field.
<b>Selection Criteria</b>	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> . <b>Note:</b> This tab is displayed only if you select <b>Batch</b> option in <b>Execution Type</b> field.

- [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 Recovery** 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
<b>Code</b>	Displays the communication code.
<b>Description</b>	Displays the description of the communication.
<b>Mode</b>	Displays the mode of communication.
<b>&lt;Authorization Status&gt;</b>	Displays the authorization status of the communication. The possible values are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>&lt;Record Status&gt;</b>	Displays the status of the record. The possible values are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>

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
<b>Code</b>	Indicates the communication code.
<b>Description</b>	Indicates the description of the communication.
<b>Mode</b>	Indicates the mode of the communication.
<b>Authorization Status</b>	Indicates the authorization status of the communication. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a communication with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a communication with Unauthorized status.</li> </ul>



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


Field Name	Description
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"><li>• <b>Open:</b> Select this option if you want to search for a communication with Open status.</li><li>• <b>Closed:</b> Select this option if you want to search for a communication with Closed status.</li></ul>

- [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 Recovery** 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 and Recovery Getting Started User Guide*.

# 15

## Fees and Charges

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

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

- [Create Fees and Charges](#)
- [View Fees and Charges](#)

### 15.1 Create Fees and Charges

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


**Table 15-1 Create Fees and Charges**

Field Name	Description
<b>Code</b>	Indicates the unique identification code of the fees and charge.
<b>Description</b>	Indicates the description of the fees and charge.
<b>Type</b>	Indicates the type of fee to be calculated. The options are: <ul style="list-style-type: none"><li>• Late Fees</li><li>• PTP Broken Reversal</li><li>• Legal Charges</li><li>• Vendor Fees</li><li>• Repossession Charges</li><li>• Bankruptcy Charges</li><li>• Others</li></ul>
<b>Product Processor</b>	Indicates the product processor applicable for the fees and charge.
<b>Effective Date</b>	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.
	<div style="border: 1px solid #0070C0; padding: 10px; background-color: #E6F2FF;"> <p> <b>Note:</b></p> <p>The date should be later than or equal to the business date. However, it must be later than or equal to the effective date.</p> </div>
Fee Category	Indicates the category of the fee to be calculated. The options are: <ul style="list-style-type: none"> <li>• Fixed Amount</li> <li>• Fixed Percent</li> </ul>
Fee Method	Indicates the method used for fee calculation. The options are displayed dynamically depending on the fee category selected: <ul style="list-style-type: none"> <li>• Fixed Amount</li> <li>• Fixed Percent</li> </ul>
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: <ul style="list-style-type: none"> <li>• Overdue Amount</li> <li>• Outstanding Amount</li> <li>• Promised Amount</li> <li>• Received Amount</li> <li>• Principal Amount</li> <li>• Interest Amount</li> </ul>
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.

- [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 Recovery** 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
<b>Fee Code</b>	Displays the fee and charge code.
<b>Description</b>	Displays the description of the fee and charge.
<b>Fee Category</b>	Displays the category of fee and charge.
<b>Fee Type</b>	Displays the type of fee and charge.

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

Field Name	Description
<b>Authorization Status</b>	Displays the authorization status of the fee and charge. The possible values are: <ul style="list-style-type: none"> <li>• <b>Unauthorized</b></li> <li>• <b>Authorized</b></li> </ul>
<b>Record Status</b>	Displays the status of the record. The possible values are: <ul style="list-style-type: none"> <li>• <b>Open</b></li> <li>• <b>Closed</b></li> </ul>


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
<b>Fee Code</b>	Indicates the fees and charge code.
<b>Fee Type</b>	Indicates the type of the fees and charge.
<b>Fee Category</b>	Indicates the category of the fees and charge.
<b>Authorization Status</b>	Indicates the authorization status of the communication. The options are: <ul style="list-style-type: none"> <li>• <b>Authorized:</b> Select this option if you want to search for a communication with Authorized status.</li> <li>• <b>Unauthorized:</b> Select this option if you want to search for a communication with Unauthorized status.</li> </ul>
<b>Record Status</b>	Indicates the status of the record. The options are: <ul style="list-style-type: none"> <li>• <b>Open:</b> Select this option if you want to search for a communication with Open status.</li> <li>• <b>Closed:</b> Select this option if you want to search for a communication with Closed status.</li> </ul>

- [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 Recovery** 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 and Recovery 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
<b>Lookups</b>	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	
<b>Product Processor</b>	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
<b>Auto Number Generation</b>	DM_FA_IDENTIFERDEFINITION_ACTIONS
	DM_FA_IDENTIFERDEFINITION_AMEND
	DM_FA_IDENTIFERDEFINITION_AUTHORIZE
	DM_FA_IDENTIFERDEFINITION_AUTHQUERY
	DM_FA_IDENTIFERDEFINITION_CLOSE
	DM_FA_IDENTIFERDEFINITION_COPY
	DM_FA_IDENTIFERDEFINITION_DELETE
	DM_FA_IDENTIFERDEFINITION_GEN_NUM
	DM_FA_IDENTIFERDEFINITION_GET_ANGCONFIG
	DM_FA_IDENTIFERDEFINITION_HISTORY
	DM_FA_IDENTIFERDEFINITION_NEW
	DM_FA_IDENTIFERDEFINITION_REOPEN
	DM_FA_IDENTIFERDEFINITION_VALIDATE_LOV
	DM_FA_IDENTIFERDEFINITION_VIEW
	DM_FA_IDENTIFERDEFINITION_VIEWALL
DM_FA_IDENTIFERDEFINITION_VIEWCHANGES	
<b>Workflow</b>	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
<b>Task</b>	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
<b>Call Action</b>	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
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	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
<b>Strategy</b>	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	
<b>Segment</b>	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**

<b>Screen Name</b>	<b>Functional Activity Code</b>
<b>User Group</b>	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
<b>User Assignment</b>	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	
<b>Promise Type</b>	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**

<b>Screen Name</b>	<b>Functional Activity Code</b>
<b>Seed Data</b>	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
	<b>Communication</b>
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**

<b>Screen Name</b>	<b>Functional Activity Code</b>
<b>Fees and Charges</b>	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
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