

# Oracle® Banking Branch Cloud Service

## Servicing Configuration User Guide



Release 14.8.1.0.0  
G47176-01  
October 2025

ORACLE®

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# Preface

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## Purpose

This guide is designed to help user quickly get acquainted with the features and functionality of **Oracle Banking Accounts Retail Cloud Service**. It provides an overview to the product and the steps involved in the creation and the maintenance of Retail Accounts.

## Before You Begin

User Can refer the guide **Getting Started with Oracle Banking Cloud Service** for common elements, including Symbols and Icons, Conventions Definitions, and so forth.

## Module Prerequisite

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

## Audience

This user guide is intended for the following end Users / User Roles in a Bank:

**Table 1 User Roles**

User Role	Functions
Back Office Clerk	Input functions for contracts
Back Office Managers/Officers	Authorization functions
Product Managers	Product definition and authorization
End of Day Operators	Processing during End of Day/ Beginning of Day
Financial Controller/Product Managers	Generation of reports

## Basic Actions

This topic describes about basic actions that can be performed on a screen.

Table 2 Basic Actions

Action	Applicable Stages	Description
<b>Approve</b>	Approval	<p>The system displays a section where approval remarks if any can be input. Click <b>OK</b> to submit. The transaction is sent to the Host system through <i>Oracle Banking Routing Hub</i>. The Host system validates the transaction again and the transaction is created if all the validations are successful. If the transaction fails, the transaction is moved to Handoff retry stage, and user can view the error message. In this stage, the authorizer can retry or reject the transaction. On reject, the transaction is sent back to the maker to modify or delete it.</p> <p><b>Note:</b> The maker checker validation will be provided if the same maker tries to approve the transaction.</p>
<b>Audit</b>	Initiation, Approval, and Hand off Retry	<p>Audit details provide the logs of users who have acted on the transaction, the transaction date, and the time for all stages that the transaction has passed through.</p>
<b>Auto Authorization</b>	Initiation	<p>Auto authorization can be configured for the branch servicing screens by creating a Rule based on life cycle code.</p> <p>The steps to create the Auto authorization as follows:</p> <ol style="list-style-type: none"> <li>1. Create the fact value as <b>LIFECYCLECODE</b>.</li> <li>2. Create Rule to enable Auto authorization for any servicing screen and add the expression in Rule for that screen's lifecycle code. While creating a Rule the product processor should be given as <b>DEPOSIT</b> and fact should be selected as <b>LIFECYCLECODE</b>. For Example:   <pre>IF ( LIFECYCLECODE == TDPOMN )</pre>   <pre>output</pre>   <pre>Section1 LEVEL:0</pre> </li> <li>3. Create or modify a Rule Group with Name <b>ApprovalRuleGroup</b> and map the Rule(s) created in the step (2).</li> </ol> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Note</b></p> <p>You can define one single Rule for all the screens and add the expression for the life cycle code or you can define individual Rule for each screen and map to the Rule group.</p> </div> <p><b>Note:</b> For more information, refer to the to create Fact, Rule and Rule Group.</p>
<b>Back</b>	Initiation, Approval, and Hand off Retry	<p>In case the user missed to specify or need to modify the details in the previous segment, click to navigate to the previous segment.</p>

Table 2 (Cont.) Basic Actions

Action	Applicable Stages	Description
<b>Cancel</b>	Initiation, Approval, and Hand off Retry	Cancel operation cancels the transaction input midway without saving any data. The user is alerted that the input data would be lost before confirming the cancellation.
<b>Change Log</b>	Approval	When the authorizer clicks on the <b>Change Log</b> button, the system displays the changes made to the transaction in a pop-up window. By default, the change log is set to display only modified values. The <b>Change Log</b> button has two options, they are, <b>All</b> and <b>Updated</b> . The <b>All</b> button displays both modified and non-modified fields and the <b>Updated</b> button displays only the modified fields. The old and new values are displayed so that the authorizer can compare or verify the values and decide on further action. Also, the new values appear in red for easy recognition.
<b>Close</b>	Initiation, Approval, and Hand off Retry	Users can close the transaction input screen. The system displays a warning message to the user that any unsaved data would be lost. User can either choose to ignore the message and close the screen or choose to <b>Save and Close</b> the transaction.
<b>Delete</b>	Initiation	Delete operation deletes the transaction without saving any data. The user is alerted that the input data would be lost before confirming the deletion.
<b>Document</b>	Initiation, Approval, and Hand off Retry	The maker of the transaction can click on <b>Document</b> to upload documents that are relevant to the transaction. Once uploaded, the documents are available for viewing during authorization or by the maker.
<b>Host Error</b>	Hand Off Retry	Hand off Retry comes into use whenever a transaction input from the mid-office system fails authorization due to Host System rejection. The authorizer of the transaction can view the reason for Host rejection and take appropriate action.
<b>i icon</b>	Initiation, Approval, and Hand-off Retry	To view the Customer details such as the photograph, signature, customer ID, Account Branch, and balance, the <b>i icon</b> is used. The <b>i icon</b> becomes active once the maker of the transaction inputs the account number and tabs out of the field. The <b>i icon</b> is useful to inquire customer information about both the debit and the credit account numbers.
<b>Maximize</b>	Initiation, Approval, and Hand off Retry	User can maximize the transaction input screen.
<b>Memo</b>	Initiation, Approval, and Hand off Retry	The memos are displayed for the account number specified. If no memos are maintained and you click <b>Memo</b> , then a message is displayed that there are no memos maintained for the account. You can view the memos displayed in the dialog box and then click the <b>Close</b> icon to close. Memos are displayed upfront in Initiation and Authorization screens. In Hand-off Retry screens, you can click <b>Memo</b> to view the memos if any. The Memos will not be displayed in inquiry screens. The customer level memos having end date same as current system date are only displayed in the screens. In case of account level memos, there are no restrictions on displaying the memos. These memos are not editable.
<b>Minimize</b>	Initiation, Approval, and Hand-off Retry	Users can minimize the transaction input screen. When the screen is minimized, it appears as to a separate tab within the same web page.

Table 2 (Cont.) Basic Actions

Action	Applicable Stages	Description
<b>Multi-Level Authorization</b>	Initiation	<p>Multi-level authorization can be configured for the branch servicing screens by creating a Rule based on life cycle code. The steps to create the Multi-level authorization as follows:</p> <ol style="list-style-type: none"> <li>1. Create the fact value as <b>LIFECYCLECODE</b>.</li> <li>2. Create Rule to enable Multi-level authorization for any servicing screen and add the expression in the Rule for that screen's lifecycle code. While creating a Rule the product processor should be given as <b>DEPOSIT</b> and fact should be selected as <b>LIFECYCLECODE</b>. For Example:   <pre>IF ( LIFECYCLECODE == TDPYIN )</pre>   <pre>output</pre>   <pre>Section1 LEVEL:1~DSR_FA_TDPAYIN_AUTH,</pre> <pre>LEVEL:2~DSR_FA_TDPAYIN_AUTH</pre> <div data-bbox="781 995 899 1029" data-label="Section-Header"><b>Note</b></div> <p>If customer wants to use separate Functional Activity Code for each Level then Rule output need to be define like</p> <pre>LVELE:1~&lt;FUNCTIONAL_ACTIVITY_CODE1&gt; ,</pre> <pre>LVELE:2~&lt;FUNCTIONAL_ACTIVITY_CODE2&gt;</pre> <pre>.</pre> </li> <li>3. Create or modify a Rule Group with name <b>ApprovalRuleGroup</b> and map the rule(s) created in the step (2).</li> </ol> <div data-bbox="781 1476 899 1509" data-label="Section-Header"><b>Note</b></div> <p>You can define one single rule for all the screens and add the expression for the life cycle code or you can define individual rule for each screen and map to the rule group.</p> <p><b>Note:</b> The maker checker validation will be provided if the same maker tries to authorize the single or multi-level approval transaction.</p>



Table 2 (Cont.) Basic Actions

Action	Applicable Stages	Description
<b>Overrides</b>	Initiation, Approval, and Hand-off Retry	<p>If override messages had appeared during initiation stage and they were accepted by the maker during submission, the <b>Overrides</b> button appears in the Initiation screen if the transaction is subsequently rejected by the authorizer.</p> <p>On the <b>Override Details</b> section, click <b>Decline</b> to go back to the transaction screen to modify or cancel it, or click <b>Accept</b> to complete the initiation stage and move the transaction to the approval stage. The <b>Overrides</b> button is displayed in the Approval and Hand-off retry stage if there were any override messages generated during initiation and accepted by the maker. When the <b>Overrides</b> button is clicked, the system displays the overrides accepted by the maker.</p> <p>After verifying the transaction and override details, the authorizer can either approve or reject the transaction. Existing Approve Transaction section is modified to display the overrides if any overrides are raised during the initiation submits.</p>
<b>Reject</b>	Approval, and Hand off Retry	When an authorizer chooses to reject a transaction, the <b>Reject</b> icon is used. The system displays a pop-up screen to capture the Rejection remarks if any. Click <b>OK</b> for the transaction to be routed back to the initiation stage. Subsequently, the maker can modify or delete the transaction details.
<b>Remarks</b>	Initiation, Approval, and Hand-off Retry	<b>Remarks</b> can be used either by the maker or the authorizer of the transaction to optionally capture useful information about the transaction.
<b>Reset</b>	Hand off Retry	The reset button clears all the details displayed on the screen and allows input or selection of a different customer number.
<b>Retry</b>	Hand off Retry	The possibility of retrying a transaction arises when transaction input from the mid-office system fails authorization due to Host System rejection. Such host-rejected transactions will be present in the Hand off Retry queue in the Task Wizard. The Retry option is available only to the authorizer. Upon <b>Retry</b> , the transaction is sent to the host once again through Oracle Banking Routing Hub. Optionally, the authorizer can also <b>Reject</b> the transaction in which case it is routed back to the maker.
<b>Save and Close</b>	Initiation	<p>In case a transaction has to be closed midway due to a lack of sufficient information, the maker of the transaction can choose this option.</p> <p>On <b>Save and Close</b>, the input details are saved and the transaction screen is closed. Saved transaction details will be available in <b>My task</b>. Users can select the transaction from <b>My Task</b> and proceed with the transaction or delete it.</p>
<b>Submit</b>	Initiation	After submitting the initiation stage, the system validates the transaction with the host and displays the errors or overrides if any. In case of an error, you can modify and resubmit or cancel the transaction. In case of an override, you can modify and resubmit or proceed with the transaction by accepting the overrides.

# 1

## Overview of Servicing Configurations

The servicing configurations of the allow the bank to define its workflows.

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

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

The servicing in is driven based on the below configurations:

- Business Product
- Business Process
- [Prerequisite](#)

Before you begin performing Servicing Configurations:

### 1.1 Prerequisite

Before you begin performing Servicing Configurations:

Log in to the application homepage. For information on how to log in, refer to the .

# 2

## Branch Date Configurations

For branch servicing operations, the system allows you to configure the branch date as either the Common Core Branch Date or the Teller Branch Date. By default, the system uses the Common Core Branch Date for these operations. If you prefer to use the Teller Branch Date, then you can change the default setting by updating the **tellerIntegrationEnabled** parameter in the `obbrn-cmn-process-driver-serve` to **Y**.

- When **tellerIntegrationEnabled** = **Y**, the system uses the Teller Branch Date for branch servicing transactions.
- When **tellerIntegrationEnabled** = **N**, the system uses the Common Core Branch Date for branch servicing transactions.

# 3

## Business Product Configuration

The is equipped with business product configuration helps banks to configure various services for retail bank offerings.

This topic contains the following subtopics:

- [About Business Process Configuration](#)  
The business process configuration defines the stages, respective data segments, checklists, documents required, and advice generation for the stages.
- [Create Business Product](#)  
User can use this screen to create the business product and map it to the host product.
- [View Business Process](#)  
supports viewing the business process created. The **View Business Process** screen allows the user to view all of the authorized, unauthorized, and closed business processes. Authorize option is also available for supervisor users for approving unauthorized business processes.

### 3.1 About Business Process Configuration

The business process configuration defines the stages, respective data segments, checklists, documents required, and advice generation for the stages.

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

The business process definition will determine the different stages required for a given combination of the process code, life cycle, and business product code. The workflow management of these stages and the relevant stage movements are defined in Plato/Conductor to:

- Orchestrate the microservices-based process flow
- Ensure a seamless transition of servicing process across various stages in that given order.

The Plato/Conductor process will drive the workflow from one stage to another based on the process outcomes at the respective stages and subject to fulfilling the mandatory data capture, confirmation on the mandatory checklist items, and submission of mandatory documents at the respective stages. The stages defined in the business process can be dynamically assigned to different user profiles or roles.

While performing the servicing transactions, the system picks the business process run-time and initiates the workflow based on the configuration. The prerequisites for configuring the business process are enumerated below:

**Table 3-1 Prerequisites for Configuration - Field Description**

Prerequisites	Description
<b>Lifecycle</b>	Lifecycle represents the cycle of the process for which the business process is created. These are factory-shipped codes and currently support servicing transactions such as customer account transactions, term deposit transactions, and loan account transactions.
<b>Process Code</b>	Process code defines the various stages relevant for servicing transactions. Process code configuration allows you to define the business process flow that needs to be mapped for the business product and lifecycle code combination in the business process configuration.  A set of default process codes are factory-shipped for the reference workflow. User can also create process codes in CMC_TM_PROCESS_CODE and CMC_TM_PROCESS_STAGE tables.
<b>Business Product</b>	Business product maintenance allows configuring the various business products by the product offerings that the bank deals with. Each business product has a unique business process defined for a specific lifecycle code selected.

## 3.2 Create Business Product

User can use this screen to create the business product and map it to the host product.

The following data segments of the screen allows user to define the various elements for the products:

- Business Product Details
- Host Product Mapping

**Perform the following steps to create business product:**

1. On the **Home** screen, from the **Servicing Configurations**, under **Business Product**, click **Create Business Product**. User can also open the screen by specifying **Create Business Product** in the search icon bar and selecting the screen.

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

**Figure 3-1 Create Business Product - Business Product Details**

**Business Product Details**

Errors & Overrides

Screen(1/2)

**Business Product Details**

Product Type: Customer Account Services

Product Sub Type: Scheduled Transfer

Business Product Code: SCHTRF

Business Product Description: Standing Instruction Scheduled Tran

Channel Allowed: ☐

Audit

Cancel Save & Close Next

2. On the **Business Product Details** segment, specify the fields. For more information on fields, refer to the field description table.

Table 3-2 Business Product Details – Field Description

Field	Description
<b>Product Type</b>	Select the product from the drop-down list. The available options are: <ul style="list-style-type: none"> <li>• <b>Customer Account Services</b></li> <li>• <b>Term Deposit Account Services</b></li> <li>• <b>Loan Account Services</b></li> </ul>
<b>Product Sub Type</b>	Select the product sub-type from the drop-down list. Product sub-types supported are based on the Product Type selected. <ul style="list-style-type: none"> <li>a. <b>Customer Account Services</b> <ul style="list-style-type: none"> <li>• <b>Scheduled Transfer</b></li> <li>• <b>Sweep In to Account</b></li> <li>• <b>Sweep Out from Account</b></li> <li>• <b>Cheque Leaves Default</b></li> </ul> </li> <li>b. <b>Term Deposit Account Services</b></li> <li>c. <b>Loan Account Services</b></li> </ul>
<b>Business Product Code</b>	Specify the business product code. <b>Note:</b> The maximum length of the business product code should not be more than six characters. Alphanumeric and alphabets should be in the capital.
<b>Business Product Description</b>	Specify the business product description.
<b>Channel Allowed</b>	Select the channels that should be allowed for the business product from the drop-down list. For Example – Oracle Banking Digital Experience.
<b>Fintech Allowed</b>	Select if the business product is supported for servicing transactions from Fintech Companies.
<b>Fintech Name</b>	Select the Fintech Company name from the drop-down list. The system allows the selection of multiple companies. <b>Note:</b> This field is mandatory if <b>Fintech Allowed</b> is selected.

3. Click **Next**.
  - If **Scheduled Transfer**, **Sweep In to Account**, **Sweep Out from Account**, **Term Deposit Account Services**, or **Loan Account Services** option is selected from the **Product Sub Type** field in the **Business Product Details** segment, then the following **Host Product Mapping** segment is displayed. In this data segment, the business product is mapped to the host product and parameters for processing servicing transactions are defined.

**Figure 3-2 Create Business Product – Host Product Mapping**

The screenshot displays the 'Business Product Details' form with the 'Host Product Mapping' segment active. The form includes the following fields and controls:

- Business Product Code:** SCHTRF
- Host Product:** SI11 (selected from a dropdown)
- Host Product Description:** SI One to One Payment
- Get Product Details:** A button to refresh the data.
- Product Start Date:** October 1, 2007
- Product End Date:** March 30, 2030
- Frequency:** 1
- Product Type:** Payment
- Audit:** A button at the bottom left.
- Navigation:** Cancel, Back, and Save & Close buttons at the bottom right.
- Header:** Business Product Details, Errors & Overrides, and Screen(2/2).

For more information on fields, refer to the field description table.

**Table 3-3 Host Product Mapping - Field Description**

Field	Description
<b>Business Product Code</b>	Displays the business product code defaulted from the <b>Business Product Code</b> entered in the Business Product Details data segment.
<b>Host Product</b>	Select the host product from the drop-down list.
<b>Host Product Description</b>	Displays the product description once the host product is selected in <b>Select Host Product</b> .
<b>Get Products Details</b>	Click <b>Get Product Details</b> , and the system will default the parameter configured at the host product. When user click this button, the system defaults the values in the following fields: <ul style="list-style-type: none"> <li>– <b>Product Start Date</b></li> <li>– <b>Product End Date</b></li> <li>– <b>Frequency</b></li> <li>– <b>Product Type</b></li> <li>– <b>Minimum Sweep Amount</b></li> </ul>
<b>Product Start Date</b>	Displays the product start date defaulted from the host.
<b>Product End Date</b>	Displays the product end date defaulted from the host.
<b>Frequency</b>	Displays the frequency defaulted from the host.
<b>Product Type</b>	Displays the product type defaulted from the host.
<b>Minimum Sweep Amount</b>	Displays the minimum sweep amount defaulted from the host. <b>Note:</b> This field is displayed only if the <b>Product Sub Type</b> in the <b>Business Product Details</b> segment is selected as <b>Sweep Out from Account</b> or <b>Sweep In to Account</b> .

- If **Cheque Leaves Default** option is selected from the **Product Sub Type** field in the **Business Product Details** segment, then the following **Host Product Mapping** segment is displayed.

**Figure 3-3 Create Business Product – Host Product Mapping (Cheque Leaves Default)**

**Business Product Details** Errors & Overrides Screen(2/2)

**Host Product Mapping**

Default Cheque Book Size  
5, 10, 15

Host Product	Cheque Book Sizes	Action
SAVIN - Savings Account_Regular	25, 30, 35	

Page 1 of 1 (1 of 1 Items) |< < 1 > >|

**Audit** **Cancel** **Back**

For more information on fields, refer to the field description table.

**Table 3-4 Create Business Product – Host Product Mapping (Cheque Leaves Default) – Field Description**

Field	Description
<b>Default Cheque Book Size</b>	Specify the numeric values for cheque book sizes against those accounts, for which the Account Classes have not been mapped or that have been created newly in the system. <b>Note:</b> A <b>Close</b> icon is displayed next to the value specified as you tab out of the field. To remove the value, click the <b>Close</b> icon.
<b>Host Product</b>	Select the account classes defined in the system. <b>Note:</b> <ul style="list-style-type: none"> <li>– This field is enabled if you click the <b>Add</b> icon displayed above the table.</li> <li>– An Account Class cannot belong to more than one group of Host Product.</li> </ul>
<b>Cheque Book Sizes</b>	Specify numeric values for the cheque book sizes for the account classes selected. <b>Note:</b> <ul style="list-style-type: none"> <li>– This field is enabled if you click the <b>Add</b> icon displayed above the table.</li> <li>– You are not allowed to enter duplicate values in this field.</li> </ul>
<b>Action</b>	Displays the <b>Delete</b> icon to remove the row added. <b>Note:</b> This field is enabled if you click the <b>Add</b> icon displayed above the table.

4. Click **Save & Close**.

## 3.3 View Business Process

supports viewing the business process created. The **View Business Process** screen allows the user to view all of the authorized, unauthorized, and closed business processes. Authorize option is also available for supervisor users for approving unauthorized business processes.

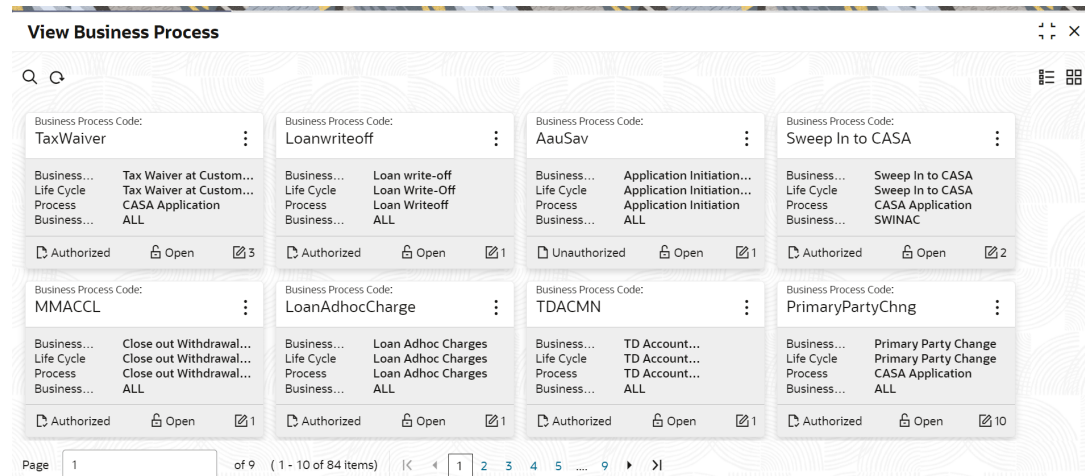
Perform the following steps to view business process:



1. On the **Homepage**, from the **Servicing Configurations**, under **Business Process**, click **View Business Process**. You can also open the screen by specifying **View Business Process** in the search icon bar and selecting the screen.

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

**Figure 3-4 View Business Process**



2. On the **View Business Process** screen, you can perform the following actions:
  - Search for a particular business process.
  - Add preference for a business process.
  - Refresh the page to view the latest updates.
  - Change view to grid or tile.
3. On the **View Business Process** screen, view the business product set for the required services. For more information on the options, refer to the table below.

**Table 3-5 View Business Process – Field Description**

Field	Description
<b>Business Process Code</b>	Displays the business process set for the service.
<b>Business Process Description</b>	Displays the description for the business process.
<b>Life Cycle</b>	Displays the life cycle set for the business process.
<b>Process</b>	Displays the process.
<b>Business Product</b>	Displays the business code.

4. Each tile also displays the following information:
  - Authorized or Unauthorized
    - For Authorized status: The **Actions** icon provides the options to Unlock, Close, Copy, and View.
    - For Unauthorized status: The **Actions** icon provides the options to Unlock, Authorize, Delete, Copy, and View.
  - Open, In Progress, or Closed

- Number of edits performed on the business process.

# 4

## Business Process Configuration

The is installed with business process configuration helps banks to build the desired workflow for servicing transactions.

This topic contains the following subtopics:

- [About Business Process Configuration](#)  
The business process configuration defines the stages, respective data segments, checklists, documents required, and advice generation for the stages.
- [Create Business Process](#)  
The **Create Business Process** screen helps to configure the workflow for servicing transactions. This process will allow defining the data segments, checklists, documents, and advices for the stages defined in the process code selected for the lifecycle code and business product combination.
- [View Business Process](#)  
supports viewing the business process created. The **View Business Process** screen allows the user to view all of the authorized, unauthorized, and closed business processes. Authorize option is also available for supervisor users for approving unauthorized business processes.

### 4.1 About Business Process Configuration

The business process configuration defines the stages, respective data segments, checklists, documents required, and advice generation for the stages.

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

The business process definition will determine the different stages required for a given combination of the process code, life cycle, and business product code. The workflow management of these stages and the relevant stage movements are defined in Plato/Conductor to:

- Orchestrate the microservices-based process flow
- Ensure a seamless transition of servicing process across various stages in that given order.

The Plato/Conductor process will drive the workflow from one stage to another based on the process outcomes at the respective stages and subject to fulfilling the mandatory data capture, confirmation on the mandatory checklist items, and submission of mandatory documents at the respective stages. The stages defined in the business process can be dynamically assigned to different user profiles or roles.

While performing the servicing transactions, the system picks the business process run-time and initiates the workflow based on the configuration. The prerequisites for configuring the business process are enumerated below:

Table 4-1 Prerequisites for Configuration - Field Description

Prerequisites	Description
<b>Lifecycle</b>	Lifecycle represents the cycle of the process for which the business process is created. These are factory-shipped codes and currently support servicing transactions such as customer account transactions, term deposit transactions, and loan account transactions.
<b>Process Code</b>	Process code defines the various stages relevant for servicing transactions. Process code configuration allows you to define the business process flow that needs to be mapped for the business product and lifecycle code combination in the business process configuration.  A set of default process codes are factory-shipped for the reference workflow. User can also create process codes in CMC_TM_PROCESS_CODE and CMC_TM_PROCESS_STAGE tables.
<b>Business Product</b>	Business product maintenance allows configuring the various business products by the product offerings that the bank deals with. Each business product has a unique business process defined for a specific lifecycle code selected.

## 4.2 Create Business Process

The **Create Business Process** screen helps to configure the workflow for servicing transactions. This process will allow defining the data segments, checklists, documents, and advices for the stages defined in the process code selected for the lifecycle code and business product combination.

This screen allows configuring the elements for each of the stages of the servicing transactions. For information on the elements, refer to the table below:

Table 4-2 Elements of Business Process

Element	Description
<b>Data Segment</b>	A data segment, as the name suggests is an individual block of data. Bringing in data segments allows to break down a huge process into smaller units, which will be easier to update, maintain, and process. The business process consists of several data segments that make up the stage.  Business process definition enables the user to perform the following: <ul style="list-style-type: none"> <li>• Add 'n' number of data segments to each stage.</li> <li>• Set the data segment as mandatory or non-mandatory.</li> <li>• Set the data segment as editable or non-editable.</li> <li>• Control the sequence order of the data segments.</li> <li>• Select the stage.</li> </ul>
<b>Document</b>	The documents are required to be submitted by the customer for the servicing transactions.
<b>Checklist</b>	Checklists are distinct and a list of mandatory checkpoints for the servicing transactions to be configured by the bank.
<b>Advices</b>	Advices are an official letter of notices detailing an action taken or to be taken on a stated date by the bank. This is the final configuration for the Business Process creation.

**Perform the following steps to create business process:**

1. On the **Homepage**, from the **Servicing Configurations**, under **Business Process**, click **Create Business Process**. You can also open the screen by specifying **Create Business Process** in the search icon bar and selecting the screen.
- The **Create Business Process** screen is displayed.

Figure 4-1 Create Business Process

**Create Business Process**

Business Process Code: BUSINESS123

Business Process Description: BUSINESS123

Lifecycle: DOCUPD

Lifecycle Description: Update Document

Process Code: CauSav

Process Description: Customer Address Update

Business Product Code: ALL

Process Full View

Cancel Save

Figure 4-2 Create Business Process - Stages

**Business Process Definition**

Business Process Code: TDREDM

Business Process Description: Term Deposit Redeem Process

Lifecycle: TDREDM

Lifecycle Description: Term Deposit Redeem Process

Process Code: TDREDM

Process Description: TDREDEMPTION

Business Product Code: ALL

Process Full View

Cancel Save

**Application Entry**

Application Entry

1 Redemption (Mandatory Editable)

2 Payout Details (Mandatory Editable)

3 Additional Details (Optional Editable)

Audit

Cancel Save

2. On the **Create Business Process** screen, specify the fields. For more information on fields, refer to the field description table.

Table 4-3 Create Business Process - Field Description

Field	Description
<b>Business Process Code</b>	Specify an alphanumeric business process code. <b>Note:</b> The maximum length allowed is 16.
<b>Business Process Description</b>	Specify the description of the business process code. <b>Note:</b> The maximum length allowed is 60 alphanumeric characters.
<b>Lifecycle</b>	Search and select the lifecycle code.
<b>Lifecycle Description</b>	Displays the description of the lifecycle selected.
<b>Process Code</b>	Search and select the process code of the business process flow that needs to be mapped for the lifecycle code and business process code combination. <b>Note:</b> Once user select the process code, the elements and stages are displayed on the screen.
<b>Process Description</b>	Displays the description of the selected process code.
<b>Business Product Code</b>	Specify the business product code for which the business process is being created. Alternatively, the system allows selecting 'All', in which case the business process will apply to all the business products that are associated with the lifecycle and process code.

**Note**

The system allows you to configure only one business process for a combination of **Lifecycle** and **Business Product Code**.

- On the **Create Business Process** screen, click **Data Segments** tab and then click **Add** icon on the header panel.

The **Data Segments** screen is displayed.

Figure 4-3 Data Segments

**Data Segments**

- Courtesy pay ☐
- Overdue ☐
- Bulletin Maintenance ☐
- Bulletin Summary ☐
- Charges** ☒
- Approval Details ☐
- Charge Details ☐
- Interest Details ☐
- Add-On Card Holder ☐

**Preview**

**Charge Details**

Charge Code	Currency	Defaulted Amount	Modified Amount	Charge Details	Waiver
No data to display.					

**Settings**

Add Cancel

- On the **Data Segments** screen, select the required data segment or data segments for the selected stage, and specify the fields. For more information on fields, refer to the field description table.

**Table 4-4 Data Segments - Field Description**

Field	Description
<b>Preview</b>	Click on this tab to view the data segment.
<b>Settings</b>	Specify the settings.
<b>Mandatory</b>	Select if the data segment is mandatory.
<b>Editable</b>	Select if the data segment is editable.
<b>Select Products</b>	Select the products for which the data segment is relevant.

- On the **Data Segments** screen, click **Add**.

The **Create Business Process** screen is displayed with the data added segment.

**Figure 4-4 Create Business Process - Added Data Segments**

The screenshot displays the 'Create Business Process' interface. At the top, there are input fields for 'Business Process Code' (BUSINESS12), 'Business Process Description' (BUSINESS12), 'Lifecycle' (DOCUPD), and 'Lifecycle Description'. Below these are 'Process Code' (TDROLV) and 'Process Description' (TD Rollover). A 'Business Product Code' dropdown is set to 'ALL'. An 'Update Document' button and a 'Process Full View' button are also present. A tabbed interface shows 'Application Entry' as the active tab. On the left, a sidebar lists 'Data Segments', 'Documents', 'Checklist', and 'Advices'. The main area shows two data segments: '1 Deposits' and '2 External TD'. Both segments are marked as 'Mandatory' and 'Editable'. At the bottom right, there are 'Cancel' and 'Save' buttons.

**Note**

The system allows to re-sequence the data segment by dragging and dropping over the specific data segment.

- On the **Create Business Process** screen, select the desired stage, and click **Document** tab to define the specific documentation requirement.

The **Documents** segment is displayed.

**Figure 4-5 Create Business Process – Documents**

- On the **Documents** segment, specify the fields. For more information on fields, refer to the field description table.

**Table 4-5 Documents - Field Description**

Field	Description
<b>Document Type</b>	Search and select the document type.
<b>Document Description</b>	Displays the corresponding description of the document.
<b>Mandatory</b>	Select if it is mandatory to submit the document for the stage.
<b>Business Products</b>	Select the required option for the document submission requirement. The available options are: <ul style="list-style-type: none"> <li><b>Single Product</b></li> <li><b>List of Products</b></li> <li><b>All</b></li> </ul>

- On the **Create Business Process** screen, select the desired stage, and click **Checklist** tab.

The **Checklist** segment is displayed.

**Figure 4-6 Create Business Process – Checklist**



9. On the **Checklist** segment, specify the fields. For more information on fields, refer to the field description table.

**Table 4-6 Checklist - Field Description**

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

10. On the **Create Business Process** screen, select the desired stage, and click **Advices** tab. The **Advices** segment is displayed.

**Figure 4-7 Create Business Process – Advices**

11. On the **Advices** segment, specify the fields. For more information on fields, refer to the field description table.

**Table 4-7 Advices - Field Description**

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

12. Click **Save** to create the business process.

At this point, the status of the business process is unauthorized. A user with supervisor access has to approve the business process. Once approved, the status of the business process changes from unauthorized to authorized, and is activated for usage in the servicing transactions.

## 4.3 View Business Process

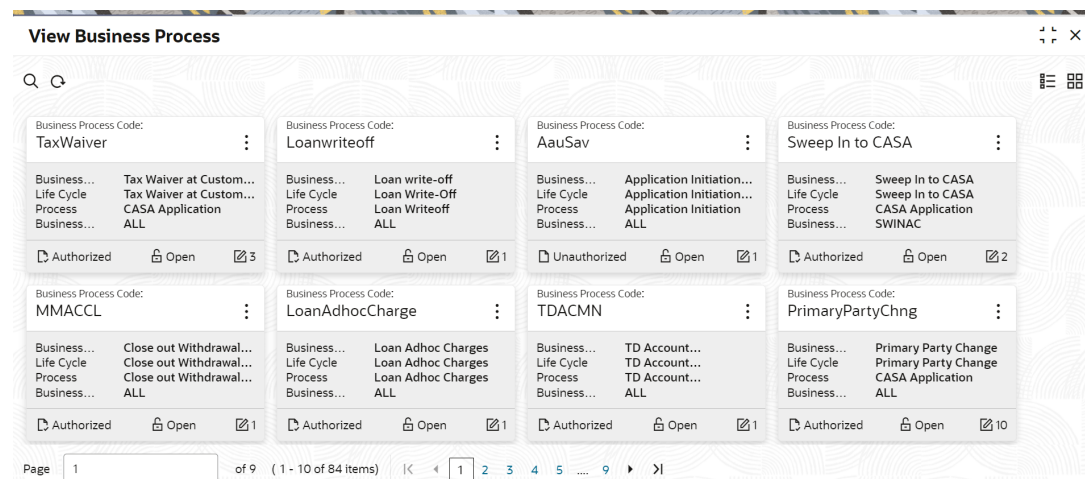
supports viewing the business process created. The **View Business Process** screen allows the user to view all of the authorized, unauthorized, and closed business processes. Authorize option is also available for supervisor users for approving unauthorized business processes.

Perform the following steps to view business process:

1. On the **Homepage**, from the **Servicing Configurations**, under **Business Process**, click **View Business Process**. You can also open the screen by specifying **View Business Process** in the search icon bar and selecting the screen.

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

**Figure 4-8 View Business Process**



2. On the **View Business Process** screen, you can perform the following actions:
  - Search for a particular business process.
  - Add preference for a business process.
  - Refresh the page to view the latest updates.
  - Change view to grid or tile.
3. On the **View Business Process** screen, view the business product set for the required services. For more information on the options, refer to the table below.

**Table 4-8 View Business Process – Field Description**

Field	Description
<b>Business Process Code</b>	Displays the business process set for the service.
<b>Business Process Description</b>	Displays the description for the business process.
<b>Life Cycle</b>	Displays the life cycle set for the business process.

**Table 4-8 (Cont.) View Business Process – Field Description**

Field	Description
<b>Process</b>	Displays the process.
<b>Business Product</b>	Displays the business code.

4. Each tile also displays the following information:
- Authorized or Unauthorized
    - For Authorized status: The **Actions** icon provides the options to Unlock, Close, Copy, and View.
    - For Unauthorized status: The **Actions** icon provides the options to Unlock, Authorize, Delete, Copy, and View.
  - Open, In Progress, or Closed
  - Number of edits performed on the business process.

# 5

## Maintenance

Under the **Maintenance** menu, you can maintain the details of an account.

This topic contains the following subtopics:

- [Bulletin Board Maintenance](#)  
This topic helps you to create, view, modify, or delete the bulletin messages.
- [Memo Maintenance](#)  
This topic describes the systematic instruction about Memo Maintenance. User can add, edit, or delete a memo using this screen.
- [Branch Servicing Auto Auth Setup](#)  
User can enable or deactivate the auto-authorization for servicing operations by using the **Branch Servicing Auto Auth Setup** screen.

### 5.1 Bulletin Board Maintenance

This topic helps you to create, view, modify, or delete the bulletin messages.

This topic contains the following subtopics:

- [Create Bulletin](#)  
This topics helps you to create, view, modify, or delete the bulletin messages.
- [View Bulletin](#)  
This topic describes the systematic instructions to View or Modify the Bulletin Message.

#### 5.1.1 Create Bulletin

This topics helps you to create, view, modify, or delete the bulletin messages.

However, Joint account holders share equal responsibility for charges or any other liability arising from holding such accounts.

**To create bulletin:**

1. On the **Home** screen, from **Interaction Services**, under **Maintenance**, **Bulletin**, click **Create Bulletin**, or specify the **Create Bulletin** in the Search icon bar.  
**Create Bulletin** screen is displayed.

Figure 5-1 Create Bulletin

**Create Bulletin** Errors & Overrides

Message Type: **Alert** Start Date: **Feb 1, 2023** Expiry Date:

Subject: **Payment Due**

Message:

Attachments: [Drop files here or click to select](#)

**User Role Mapping**

User / Role	ID	Name	Action
User	CASAUSER2	CASAUSER2	

Page 1 of 1 (1 of 1 items) Cancel Save

- On the **Create Bulletin** screen, specify the fields.

**Note**

For more information on fields, refer to the field description table.

Table 5-1 Create Bulletin - Field Description

Field	Description
<b>Message Type</b>	Select the message type from the drop-down list. The available options are: <ul style="list-style-type: none"> <li><b>Alert</b> - Select this option if the message requires immediate attention from the users. When this option is selected, the Bulletin message is represented with <b>Alert</b> icon on the widget.</li> <li><b>Information</b> - Select this option if the bulletin is for information purposes only. When this option is selected, the Bulletin message is represented with <b>Information</b> icon on the widget.</li> </ul>
<b>Start Date</b>	Select the date from which the bulletin message displays on the widget. <div> <p><b>Note</b></p> <p>This date cannot be lesser than the current business date.</p> </div>
<b>End Date</b>	Users can specify the expiry date of the bulletin message. Once the bulletin message reaches the expiry date, the message gets removed from the bulletin board widget.
<b>Subject</b>	Enter a brief description of the bulletin message.

Table 5-1 (Cont.) Create Bulletin - Field Description

Field	Description
<b>Message</b>	Enter a detailed description of the message.
<b>Attachments</b>	You can attach relevant documents using this option. You can either drag and drop files into the space provided or select documents from your local drive. You can preview or delete an attachment before submitting the transaction for authorization.

- To preview an attached document, click the document link.

The **Document Uploaded** pop up window is displayed.

**Note**

The document preview is available only to those document types that support the preview feature by default. Where the preview feature is not supported, click on **Download** button to download the attached document before viewing.

- Click the **Close** icon to close the **Document Uploaded** pop up window.
- User can target bulletin messages towards user groups or specific users. Using the **User Role Mapping** table, User can configure User Roles or Users to a particular bulletin.
- Click the **Add** icon to specify User Role or User mapping to the bulletin message.

**Note**

For more information on fields, refer to the field description table.

Table 5-2 User Role Mapping - Field Description

Field	Description
<b>User/Role</b>	Select User/Role from the drop-down list.
<b>ID</b>	When <b>User</b> is selected, click the search icon to view the <b>User Mapping</b> pop-up window. By default, this window lists all the Users present in the system. User can search for a specific User by providing User, or Username and click <b>Fetch</b> . When <b>Role</b> is selected, click the search icon to view the <b>Role Mapping</b> pop-up window. By default, this window lists all the Roles present in the system. You can search for a specific Role by providing Role or Role Name and click <b>Fetch</b> .
<b>Name</b>	User or Role name is displayed based on the user id or role id selected.
<b>Actions</b>	Displays the <b>Delete</b> icon, to remove the respective user or role.

- After the message is created, the status of the message is updated as **Active** or **Awaited**.  
System updates the status of the Bulletin message as **Active** if the start date is equal to the current business date.

**Note**

If the Start Date is future date, then the status of Bulletin message is updated as **Awaited** until the date is reached. The system automatically updates the status to **Active** once the start date is reached

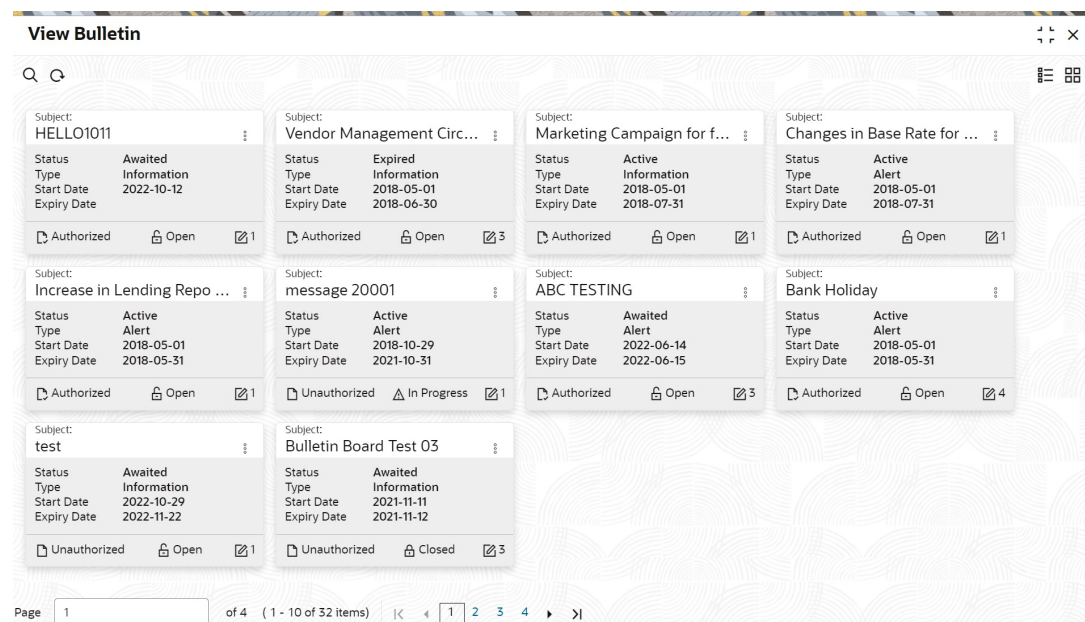
## 5.1.2 View Bulletin

This topic describes the systematic instructions to View or Modify the Bulletin Message.

1. On the **Home** screen, from **Interaction Services**, under **Maintenance**, **Bulletin**, click **View Bulletin**, or specify the **View Bulletin** in the Search icon bar.

**View Bulletin** screen is displayed.

**Figure 5-2 View Bulletin**



2. On **View Bulletin** screen, the system displays all the bulletin messages with status:
  - a. Awaited
  - b. Active
  - c. Paused
  - d. Expired
3. On the **View Bulletin** screen, user can search for specific bulletin using the **Search** icon. user can use any of the following options to search:
  - a. Message Type
  - b. Message Status
  - c. Message Reference Number
  - d. Subject
  - e. Start Date

- f. Expiry Date
  - g. Authorization Status
  - h. Record Status
4. After the input of any options mentioned above, click the **Search** button.
5. Click the **Action** icon to display the following options:
  - a. Unlock
  - b. Authorize
  - c. Delete
  - d. Close
  - e. Copy
  - f. View
6. To modify an existing bulletin message, click the **Unlock** option from the **Action** icon.  
The **Bulletin Message** screen is displayed.

**Figure 5-3 Bulletin Message**

The screenshot displays the 'Bulletin Message' interface. At the top, there's a title bar with 'Bulletin Message' and a close button. Below it, a form contains fields for 'Message Type' (set to 'Information'), 'Start Date' (Oct 12, 2022), 'Expiry Date' (empty), 'Message Status' (set to 'Awaited'), 'Message Reference Number' (BTN180890461), 'Subject' (HELLO1011), and 'Message' (TESTING MESSAGE). There's an 'Attachments' section with a 'Drop files here or click to select' prompt. Below that is a 'User Role Mapping' table with columns for 'User / Role', 'ID', 'Name', and 'Action'. The table lists four roles: CASA\_OFFICER, CASA\_ALL, CASA\_SUPERVISOR, and ALL\_ROLE. Each role has a trash icon in the 'Action' column. At the bottom, there's a pagination bar showing 'Page 1 of 1 (1-4 of 4 Items)' and buttons for 'Audit', 'Cancel', and 'Save'.

User / Role	ID	Name	Action
Role	CASA_OFFICER	CASA OFFICER ROLE	
Role	CASA_ALL	CASA ALL ROLES	
Role	CASA_SUPERVISOR	CASA SUPERVISOR ROLE	
Role	ALL_ROLE	ALL_ROLES	

7. To view the bulletin message, click the **View** option from the **Action** icon.  
**Create Bulletin** screen is displayed.



**Note**

On the create bulletin screen, all the fields are non-editable.

8. To replicate an existing bulletin, click the **Copy** option from the **Action** icon.
9. To permanently delete the existing bulletin, click the **Delete** option from the **Action** icon.
10. On **View Bulletin** screen, the system displays all the bulletin messages with status

**Note**

For more information on fields, refer to the field description table.

**Table 5-3 Tax Deducted at Source Inquiry - Field Description**

Field	Description
<b>Customer ID</b>	Enter the <b>Customer ID</b> or click the search icon to view the <b>Customer ID</b> pop-up window. By default, this window lists all the Customer ID's present in the system. User can search for a specific Customer ID by providing <b>Customer Number</b> or <b>Customer Name</b> and click on the <b>Fetch</b> button.
<b>Customer Name</b>	<b>Customer Name</b> is displayed based on the Customer ID selected.
<b>Account Number</b>	User can enter a specific account number of the customer and search Tax Deducted at Source details or click the drop-down list to select the available account numbers listed for the customer id to search the Tax Deducted at Source details. <b>Note:</b> This is an optional field.
<b>Financial Year</b>	By default, the current financial year is displayed in this field. User can select the previous financial years from the drop-down. The system displays the Tax Deducted at Source details financial year-wise.
<b>Branch</b>	The system displays the Branch Code based on the account number.
<b>Account Number</b>	The system displays the Account Number.
<b>Account Name</b>	The system displays the Account Name.
<b>Interest Amount</b>	The system displays the Credit interest on the account.
<b>Taxation Date</b>	The system displays the date of the tax application on the account.
<b>Tax Amount</b>	The system displays the Tax amount calculated on the credit interest.

## 5.2 Memo Maintenance

This topic describes the systematic instruction about Memo Maintenance. User can add, edit, or delete a memo using this screen.

1. On the **Home** screen, from **Interaction Services**, under **Maintenance**, click **Memo Maintenance**, or specify the **Memo Maintenance** in the Search icon bar.

The **Memo Maintenance** screen is displayed.

Figure 5-4 Memo Maintenance

Memo Maintenance

MemoRemarksDocuments

Create memo for

Account Number

Account Name

Account

Required

Please enter account number to perform the operation

Audit

Cancel

Save and Close

Submit

**Note**

The fields marked as Required are Mandatory.

2. On **Memo Maintenance** screen, perform the required action.  
The memo maintenance details are displayed in the screen.

Figure 5-5 Memo Maintenance Details

Memo Maintenance

MemoRemarksDocuments

Create memo for

Account Number

Account Name

Account Number

B01M000000071

PHIL FRANZ

Memo Details

Add Memo

Message

Get Instant personal Loan at 9.9% p.a.

Action

Audit

Cancel

Save and Close

Submit

3. On the **Memo Maintenance** screen, specify the fields.

**Note**

For more information on fields, refer to the field description table.

Table 5-4 Memo Maintenance - Field Description

Field	Description
Create memo for	Select the option for creating memo. The available options are: <ul style="list-style-type: none"><li><b>Account:</b> If user selects this option, then the <b>Account Number</b> and <b>Account Name</b> are displayed.</li><li><b>Deposit:</b> If user selects this option, then the <b>Deposit Account Number</b> and <b>Account Name</b> are displayed.</li></ul>
Message	Provide the text of the memo message.
Action	Click the <b>Edit</b> icon to edit the message or the <b>Delete</b> icon to delete the added memo.

4. Click **Add Memo** in the **Memo Maintenance** screen.

The **Add Memo** screen is displayed to specify the memo message.

Figure 5-6 Add Memo

**Add Memo** ✕

Message

Required

Cancel

Add Another

Add

- a. Click **Cancel** to cancel the memo message.
- b. Click **Add** or **Add Another** to add the message in the main screen.

- Click **Submit**.

The screen is successfully submitted for authorization.

## 5.3 Branch Servicing Auto Auth Setup

User can enable or deactivate the auto-authorization for servicing operations by using the **Branch Servicing Auto Auth Setup** screen.

The auto authorization can be set for Accounts, Deposits, and IRA modules of servicing.

### Note

To set up auto-authorization:

- On the **Home** screen, from the **Retail Servicing Configuration** mega menu, click **Branch Servicing Auto Auth Setup** or specify **Branch Servicing Auto Auth Setup** in the search icon bar and select the screen.

The **Branch Servicing Auto Auth Setup** screen is displayed.

**Figure 5-7 Branch Servicing Auto Auth Setup**

- From the **Accounts**, **Deposit**, and **IRA** tabs, select the required screens for which auto-authorization is to be set from the **Non-auto authorization screens** section.
- Click **Move to auto authorization**.

The screens are removed from the **Non-auto authorization screens** section and displayed in the **Auto authorization screens** section.

**Table 5-5 Branch Servicing Auto Auth Setup – Field Description**

Field	Description
<b>Non auto authorization screens</b>	Select the screens to be auto-authorized from this section. User can also search for any required screen by specifying the screen name in the <b>Search</b> field.

Table 5-5 (Cont.) Branch Servicing Auto Auth Setup – Field Description

Field	Description
<b>Auto Authorized screens</b>	This section displays the screens to be auto-authorized.
<b>Lifecycle Code</b>	Displays the lifecycle code of the screen.
<b>Screen Name</b>	Displays the screen set for auto-authorization.
<b>Action</b>	Displays the <b>Delete</b> icon. User can click to deactivate the screen from auto-authorization. Post deletion, the screen is added back to the <b>Non auto authorization screens</b> section.

**Note**

If the user selects the screen and clicks **Move to auto authorization**, then to proceed with action in other tabs, the user should click **Save**. Else, the changes made by user will be lost if switched between the modules.

**4. Click **Save**.**

The updates are saved successfully.

# 6

## Servicing Configuration

The is installed with servicing configuration helps banks to build the desired workflow for servicing transactions.

This topic contains the following subtopics:

- [Create Service Preferences](#)  
User can create service preferences for Transaction Code for Debit, Transaction Code for Credit, Exchange Rate Code, and Exchange Rate Type servicing screens using the **Create Service Preferences** screen.
- [View Service Preferences](#)  
User can view all of the authorized, unauthorized, and closed service preferences using the **View Service Preferences** screen. Authorize option is also available for supervisor users for approving unauthorized business processes.

### 6.1 Create Service Preferences

User can create service preferences for Transaction Code for Debit, Transaction Code for Credit, Exchange Rate Code, and Exchange Rate Type servicing screens using the **Create Service Preferences** screen.

To create service preferences:

1. On the **Home** screen, from the **Servicing Configurations**, under **Servicing Configurations**, click **Create Service Preferences**. User can also open the screen by specifying **Create Service Preferences** in the search icon bar and selecting the screen.  
The **Create Service Preferences** screen is displayed.

**Figure 6-1 Create Service Preferences**

The screenshot shows the 'Create Service Preferences' screen. It features a title bar with the text 'Create Service Preferences' and an 'Errors & Overrides' icon. The main content area is divided into several sections. The 'Lifecycle Code' section has a search field containing 'DOCUPD' and a description 'Update Document'. The 'Transaction Parameters' section contains three search fields: 'Transaction Code For Debit' with the value '000', 'Transaction Code For Credit' with the value '000', and 'Offset GL' with the value '111100002'. The 'Exchange Rate Details' section has a search field for 'Rate Code' with the value 'STANDARD' and a dropdown menu for 'Rate Type' with the value 'Mid'. At the bottom right of the screen are 'Cancel' and 'Save' buttons.

2. On the **Create Service Preferences** screen, select or specify the required details.

**Note**

For more information on fields, refer to the field description table.

**Table 6-1 Create Service Preferences – Field Description**

Field	Description
<b>Lifecycle Code</b>	Select the lifecycle code for the servicing screens.
<b>Description</b>	Displays the description based on the lifecycle code selected.
<b>Transaction Parameters</b>	This section displays the fields to select the parameters for the transactions.
<b>Transaction Code For Debit</b>	Select the code for the debit transaction.
<b>Transaction Code For Credit</b>	Select the code for the credit transaction.
<b>Offset GL</b>	Select the offset GL for the transaction.
<b>Exchange Rate Details</b>	This section displays the fields to create the rate preferences.
<b>Rate Code</b>	Select the code for the exchange rate.
<b>Rate Type</b>	Select the type for the exchange rate. The available options are: <ul style="list-style-type: none"> <li>• <b>Mid</b></li> <li>• <b>Buy/Sell</b></li> </ul>

3. Click **Save**.

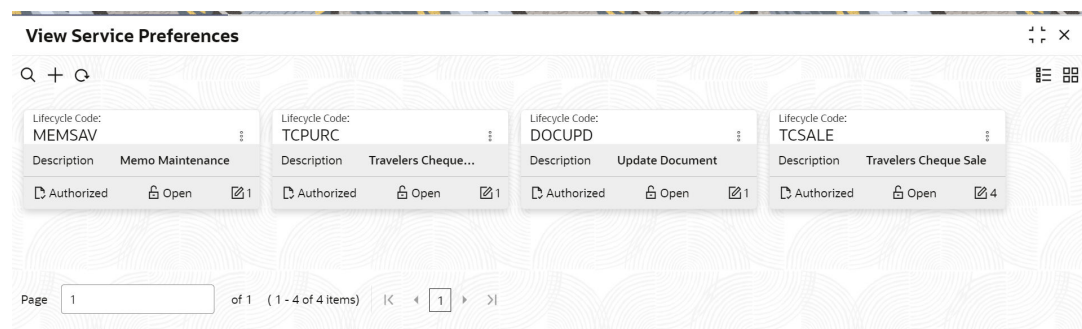
## 6.2 View Service Preferences

User can view all of the authorized, unauthorized, and closed service preferences using the **View Service Preferences** screen. Authorize option is also available for supervisor users for approving unauthorized business processes.

To view the service preferences:

1. On the **Home** screen, from the **Servicing Configurations**, under **Servicing Configurations**, click **View Service Preferences**. User can also open the screen by specifying **View Service Preferences** in the search icon bar and selecting the screen.

The **View Service Preferences** screen is displayed.

**Figure 6-2 View Service Preferences**

2. On the **View Service Preferences** screen, User can perform the following actions:

- Search for a particular service preference.
  - Add preference for a service.
  - Refresh the page to view the latest updates.
  - Change view to grid or tile.
3. On the **View Service Preferences** screen, view the preferences set for the required services.

**Note**

For more information on the options, refer to the table below.

**Table 6-2 View Service Preferences – Field Description**

Field	Description
<b>Lifecycle Code</b>	Displays the lifecycle code set for the service.
<b>Description</b>	Displays the description for the lifecycle code.

4. Each tile also displays the following information:
- Authorized or Unauthorized
    - For Authorized status: The **Actions** icon provides the options to Unlock, Close, Copy, and View.
    - For Unauthorized status: The **Actions** icon provides the options to Unlock, Authorize, Delete, Copy, and View.
  - Open, In Progress, or Closed
  - Number of edits performed on the set preferences.



# Glossary

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