SETUP YEARLY FEE FOR CREDIT PRODUCT

1. Add event type
   1. For card expired

* Navigate ROOT\OpenWay\Full\Configuration Setup\Products\Event Types
* Click “Insert new record”
* Input values
  + Product: Issuing
  + Contract: Card
  + Institution: ORIENT COMMERCIAL BANK
  + Name: Set Card Expired
  + Code: CARD\_EXPIRED
  + Duration Type: Unique
  + Duration: 0
* Click “Save form changes”
* Click “Full Info” 🡪 Open “Full Info for …” form
  + Update values
    - New Status: Card Expired
  + Click “Save form changes”
  + Close form
* Action 🡪 Check
  1. For card approved
* Navigate ROOT\OpenWay\Full\Configuration Setup\Common Handbooks\User Classifiers
* Select “OCB Product Type” & Click “Values” 🡪 Open “Values for …” form
  + Click “Insert new record”
  + Input values
    - Name: Pre-Approved
    - Code: PREAPPROVED\_PROD
  + Click “Save form changes”
  + Close form
* Navigate ROOT\OpenWay\Full\Configuration Setup\Products\Event Types
* Click “Insert new record”
* Input values
  + Product: Issuing
  + Contract: Card
  + Institution: ORIENT COMMERCIAL BANK
  + Name: Set Card Pre-Approved
  + Code: CARD\_PREAPPROVED
  + Duration Type: Unique
  + Duration: 0
* Click “Save form changes”
* Click “Full Info” 🡪 Open “Full Info for …” form
  + Update values
    - New Status: Card Pre-Approved
  + Click “Save form changes”
  + Close form
* Action 🡪 Check
* Click “Insert new record”
* Input values
  + Product: Issuing
  + Contract: Card
  + Institution: ORIENT COMMERCIAL BANK
  + Name: Set Card Inactive
  + Code: CARD\_INACTIVE
  + Duration Type: Unique
  + Duration: 0
  + Special Parms: IF\_CS\_TYPE=CONTR\_STATUS;IF\_CS\_VALUE=66;
* Click “Save form changes”
* Click “Full Info” 🡪 Open “Full Info for …” form
  + Update values
    - New Status: Card Inactive
  + Click “Save form changes”
  + Close form
* Action 🡪 Check
* Click “Insert new record”
* Input values
  + Product: Issuing
  + Contract: Account
  + Institution: ORIENT COMMERCIAL BANK
  + Name: Set Account Normal
  + Code: ACCOUNT\_NORMAL
  + Duration Type: Unique
  + Duration: 0
  + Special Parms: IF\_CS\_TYPE=CONTR\_STATUS;IF\_CS\_VALUE=09;
* Click “Save form changes”
* Click “Full Info” 🡪 Open “Full Info for …” form
  + Update values
    - New Status: Account Normal
  + Click “Save form changes”
  + Close form
* Action 🡪 Check
* Click “Insert new record”
* Input values
  + Product: Issuing
  + Contract: Account
  + Institution: ORIENT COMMERCIAL BANK
  + Name: Change Product Type to Pre-Approved
  + Code: PRODDUCT\_CAT\_2\_PREAPPROVED
  + Duration Type: Unique
  + Duration: 0
* Click “Save form changes”
* Click “Insert new record”
* Input values
  + Product: Issuing
  + Contract: Account
  + Institution: ORIENT COMMERCIAL BANK
  + Name: Set Account Pre-Approved
  + Code: ACCOUNT\_PREAPPROVED
  + Duration Type: Unique
  + Duration: 0
* Click “Save form changes”
* Click “Full Info” 🡪 Open “Full Info for …” form
  + Update values
    - New Status: Account Pre-Approved
  + Click “Save form changes”
  + Close form
* Click “Event Chain” 🡪 Open “Event Chain for …” form
  + Click “Insert new record”
  + Input values
    - Next Event Type: Change Product Type to Pre-Approved
    - Contract For: Contract Itself
  + Click “Save form changes”
  + Close form
* Action 🡪 Check
* Click “Insert new record”
* Input values
  + Product: Issuing
  + Contract: Account
  + Institution: ORIENT COMMERCIAL BANK
  + Name: Check Pre-Approved
  + Code: CHECK\_PREAPPROVED
  + Duration Type: Unique
  + Duration: 0
  + Special Parms: IF\_BAL\_TYPE=CR\_LIMIT;IF\_BAL\_VALUE=1;
* Click “Save form changes”
* Click “Event Chain” 🡪 Open “Event Chain for …” form
  + Click “Insert new record”
  + Input values
    - Next Event Type: Set Account Pre-Approved
    - For Contract: Contract Itself
  + Click “Save form changes”
  + Click “Insert new record”
  + Input values
    - Next Event Type: Set Card Pre-Approved
    - For Contract: Sub Contracts
  + Click “Save form changes”
  + Close form
* Action > Check
* Select “Inactive When Produced Cards” & Click “Event Chain” 🡪 Open “Event Chain for …” form
  + Click “Insert new record”
  + Input values
    - Next Event Type: Check Pre-Approved
    - For Contract: Contract Itself
  + Click “Save form changes”
  + Close form
* Select “Credit Limit Change” & Click “Event Chain” 🡪 Open “Event Chain for …” form
  + Click “Insert new record”
  + Input values
    - Next Event Type: Check Pre-Approved
    - For Contract: Contract Itself
  + Click “Save form changes”
  + Click “Insert new record”
  + Input values
    - Next Event Type: Set Account Normal
    - For Contract: Contract Itself
  + Click “Save form changes”
  + Click “Insert new record”
  + Input values
    - Next Event Type: Set Card Inactive
    - For Contract: Contract Itself
  + Click “Save form changes”
  + Close form
* Navigate ROOT\OpenWay\Full\Configuration Setup\Common Handbooks\Classifier Actions
* Click “Insert new record”
* Input values
  + Code: PRODDUCT\_CAT\_2\_PREAPPROVED
  + Name: Change Product Type to Pre-Approved
  + Event Code: Change Product Type to Pre-Approved
* Click “Save form changes”
* Click “Rules” 🡪 Open “Rules for …” form
  + Click “Insert new record”
  + Input values
    - Classifier: OCB Product Type
    - Classifier: Pre-Approved
  + Click “Save form changes”
  + Close form

1. Setup service pack

* Navigate ROOT\OpenWay\Full\Configuration Setup\Products\Service Packs
* Select “001-Add LC Debit Annual Charge”, “001-Add MC Debit Annual Charge”, “001-Add JCB Debit Annual Charge” & Click “Misc” 🡪 Open “Misc for …” form
  + Select each record & Click “Service – Full” 🡪 Open “Service – Full for …” form
    - Add more status “01”, “73” into Service Details
    - Click “Save form changes”
    - Close form
  + Approve with current banking date
  + Approve product service pack
* Select “001-Add JCB Annual Charge”, “001-Add JCB Annual Default”, “001-Add LC Annual Charge”, “001-Add LC Annual Default”, “001-Add MC Annual Charge”, “001-Add MC Annual Default” & Click “Misc” 🡪 Open “Misc for …” form
  + Select each record with Account Type = Open Sale Fee & Click “Service – Full” 🡪 Open “Service – Full for …” form
    - Add more status “01”, “73” into Service Details
    - Click “Save form changes”
    - Close form
  + Approve with current banking date
  + Approve product service pack
* Select “001-Add JCB Annual Charge”, “001-Add JCB Annual Default”, “001-Add LC Annual Charge”, “001-Add LC Annual Default”, “001-Add MC Annual Charge”, “001-Add MC Annual Default” & Click “Events” 🡪 Open “Events for …” form
  + Click “Insert new record”
  + Input values
    - Event Type: Change Classifier To Activated Card
    - Switch Tag: Yes
  + Click “Save form changes”
  + Approve product service pack