

Events

We have incorporated an extensive and powerful tool called ‘Events’. This is a monumental change for RMEx. This interface, which relies on GUI to be implemented, allows a user to point and click on an ‘events’ button, triggering one of the system defined events. e.g., attempt, contact or promised payment.

Once the user has made their selection, this event would trigger another action needed by the user. Management defines the subsequent actions. This is a complete change in how a collector can work accounts. It could be described as a new “scripting engine” that guides a collector through a series of steps, making sure the correct questions are asked, the right information is obtained and the accounts are worked in the best way. Along the way, the correct smart codes could be applied, without the collector actually entering a single smart code!

So, after the user makes their first selection e.g., attempt, new options should appear allowing the user to select the appropriate circumstance(s). Did the user attempt the work number, home number or other? These options should be set up by management and made available to the user. Additionally, when the user selects each step, the system is able to apply a smart code and apply a dynamic score code, updating the dynamic score on the account, removing the need for an agent to update accounts using smart codes!

There are two types of Events,

- 1) Main events
- 2) Sub Events

MAIN Events are SYSTEM defined and SUB Events are USER defined. By default, events are ‘expandable’. So, events can trigger subsequent events.

The ‘Expanding’ rules can be controlled at several levels;

- ✓ Client
- ✓ User
- ✓ Description code
- ✓ Account status
- ✓ ACAT
- ✓ Legal/non legal and Linked balance (Legal/non legal and Linked balance can be found in System Control menu 3, opt 19, opt 3 while the others are set under their respective control files)

Since an event allows a smart code to be entered, smart codes are no longer the primary source for updating accounts. Additionally, the Dynamic Score by Smart Code table does not need to be updated since the event associates a dynamic score code to the action. While smart codes are mandatory for all events, it is not mandatory that the smart code be applied – allowing management to decide which smart codes get applied during a series of actions.

Note: The rules set up at the Smart Code level will be enforced when an agent selects an event.

For example, if the Smart Code applied by the event has been set up to force the user to enter notes and a follow-up date, when the agent selects that event and the event window is presented to the agent, they will be forced to enter notes and a follow-up date. Additionally, if the smart code entered for the event forces a 'note' – the event will reflect the requirement by showing a “Y” in the note field. The same logic follows for the letter, recall and follow-up date fields. Lastly, up to 99 sub events can be created.

An example from the users' perspective:

The user selects the 'event' button and the Main Event 'Attempt' is selected. Another window with the possible Sub Events is displayed, such as, Called Home and Called Work. (At this point, the user could be stopped and forced to enter a note - “No Answer or Left Message). OR, when the user clicked on Called Home, the user would be presented with more Sub Events (Eg.- Left Message or No Answer).

During this explanation, the user never entered a smart code. Everything is driven from the events presented to the user. The process is controlled and naturally directs the agent to enter the pertinent information, thus working the account without smart codes. 'Events' will allow management to control the actions updated on an account, dramatically changing how accounts are worked. The strength and power of these events entirely depends on how the 'chain of events' are set up. Remember, Events are actions, that when triggered, will update the Dynamic Score AND apply a smart code, eliminating the need for the user to remember and enter smart codes. Additionally, the user is moving through these **events using the new GUI interface – reducing the time spent updating an account; applying notes that are consistent; scoring accounts as users apply specific actions and leaving a concise audit trail for client reviews.**

Main Events –

Main Events are the first line of action from which all sub events occur.

There is a System Control file containing the *system* defined “Main” events where you will have the ability to create and link Sub Events to the Main Events. The main events will:

- ✓ Apply Smart Codes
- ✓ Force users to follow the applied Smart Code rules
- ✓ Associate a Dynamic Score Code to an event in order to adjust the consumer's score
- ✓ Notate the account

Go to System Control – Menu 3 and select Dynamic Scoring/Events options. Then select Events – System Control Setup. The following screen is presented:

RMEx **QUANTRAX CORPORATION INC.**

Event system control - First level

Type options, Press Enter.
2=Change 6=Sub event

Opt	Event Code	Description	Expand	Smart code	Dyn. Sc
<input type="checkbox"/>	01	Attempt...		301	4001
<input type="checkbox"/>	02	Answering machine		201	
<input type="checkbox"/>	03	Contact	Y	201	
<input type="checkbox"/>	04	RPC	N	101	4001
<input type="checkbox"/>	05	Promise/Payment	1	101	
<input type="checkbox"/>	06	Dispute/Attorney/BK/Deceased	N	601	6001
<input type="checkbox"/>	07	Legal request	N	701	7001
<input type="checkbox"/>	08	Skip tracing	Y	201	8001
<input type="checkbox"/>	09	Written correspondence	Y	901	9001
<input type="checkbox"/>	10	Client interaction	Y	123	1101
					More...

F7-Exit

Let's focus on the first 'Main Event' listed, Event code **01 – Attempt**. To update the main event, place a 2 in front of the event and enter. The following screen will be presented.

RMEx **QUANTRAX CORPORATION INC.**

ENTER
ATTN
PAGEUP
PAGEDN
EXIT
HELP
CALENDAR

Event Maintenance - First level

Event code 01

Description Attempt....

Smart code 603 Do not apply if expandable (N)

Dynamic score 04001

Notes TEST NOTE 01 ATTEMPT
TEST NOTE 02 ATTEMPT
TEST NOTE 03 ATTEMPT

Do not display (N) Expand always (Y/1) y

Notes Letter Recall

Follow up date

F7-Cancel Press **ENTER to Add**

- ✓ Apply a smart code for this event – a smart code is mandatory. However, the smart code can be stopped. (There are probably smart codes already set up that can be associated with many of these events) When this event is selected the smart code will be applied. The rules of the smart code will prevail
- ✓ Do not apply if expandable (N) – This relates to the smart code entered for this event. If there are steps after this event, you may not want to have this smart code applied and only wish to have the smart codes set up for subsequent events applied
- ✓ Enter a Dynamic Score Code for this event. So, select one of the Dynamic scores e.g., 4001 – Right Party Contact. When this event is chosen, the score value associated with the DSC 4001 will raise or lower the Dynamic score on the account
- ✓ Notes: Enter notes that need applied when the event is selected. The system will apply this note as well as the note on the smart code – if applied. Anything entered on these 3 lines will be entered on the account. (Note - ALL 3 lines are applied when this event is selected each time – even if only some of the lines are filled in)
- ✓ Do not Display (N) – by default, all events are displayed. Placing an N in this field will stop this event from displaying
- ✓ Expand always (Y/1) – (Y) expand ALL subsequent events, (1) only expand one event further – stop all other subsequent events and (blank) stops at the main event

- ✓ Notes, Letter, Recall and Follow-up date. If the smart code applied forces a 'note' – the event will reflect the requirement by showing a “Y” in the note field. The same logic follows for the letter, recall and follow-up date fields

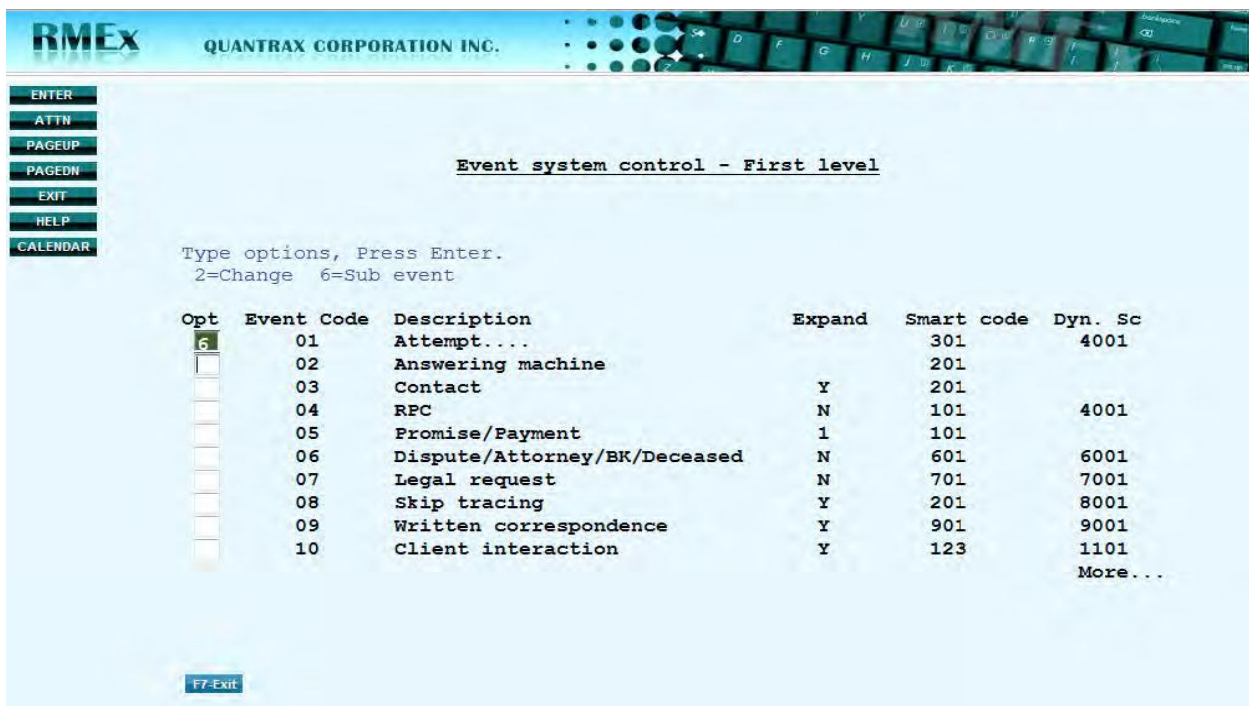
Review each Main event and fill in the information needed for each. When done, move onto the Sub events.

Sub Events –

Sub Events are all subsequent events originating from a main event.

- ✓ Sub events at the first level are single character alpha fields. So, there are only 26 - 1st sub level events available
- ✓ As you add sub levels, the system will assign the next alpha character available (AA - AAA – AAAA)
- ✓ Remember, smart codes are mandatory, but can be 'not applied'
- ✓ There is no hierarchy to the sub levels. We are simply associating a sub level to a main event (or from another sub level)

So, the first level of events begins with a 'Main Event'. Note: The first level is very important since this is 'how you work the events' to your advantage. Open the Main events again.



Let's create the 1st sub event for the Main Event - Attempt. Place a 6 in front of the main event and enter.

RMEx QUANTRAX CORPORATION INC.

Event system control - Sub Level

Main event Attempt.... Level 01

Type options, Press ENTER.
 2=Change 4=Delete 6=Next level

Opt	Sub event path	Description	Smart code	Dyn.Score
<input type="checkbox"/>	A	CALLED HOME	301	
<input type="checkbox"/>	B	CALLED WORK	101	7001
<input type="checkbox"/>	C	CALLED RELATIVE	200	

Bottom

F7-Exit F6-Add sub event

Previously added are 3 possible Sub Events for the Main event 01 - Attempt. Let’s select Sub Event “A – Called home”. Place a 2 in front of the option and press enter.

RMEx QUANTRAX CORPORATION INC.

Event Maintenance - Sub levels

Main Event Attempt....
 Level 1
 Sub-event path A

Sub-event description CALLED HOME

Smart code 301 Do not apply if expandable (N)

Dynamic score code _____

Notes _____

Notes Y Letter N Recall Y
 Follow-up date A

F7-Exit ENTER to Update

The sub event has already been defined. We have labeled this event 'Called Home'. Do you need a score associated with this sub event? Does a smart code need applied? Should notes be left? Just update as needed.

- ✓ Apply a smart code for this event – a smart code is mandatory. However, the smart code can be stopped. (There are probably smart codes already set up that can be associated with many of these events) When this event is selected the smart code will be applied. The rules of the smart code will prevail
- ✓ Do not apply if expandable (N) – This relates to the smart code entered for this event. If there are steps after this event, you may not want to have this smart code applied and only wish to have the smart codes set up for subsequent events applied. Place an N to stop the smart code from getting applied
- ✓ Enter a Dynamic Score Code for this event. So, select one of the Dynamic scores e.g., 4001 – Right Party Contact. When this event is chosen, the score value associated with the DSC 4001 will raise or lower the Dynamic score on the account
- ✓ Notes: Enter notes that need applied when the event is selected. The system will apply this note as well as the note on the smart code – if applied. Anything entered on these 3 lines will be entered on the account. (Note - ALL 3 lines are applied when this event is selected each time – even if only some of the lines are filled in)
- ✓ Notes, Letter, Recall and Follow-up date. If the smart code applied forces a 'note' – the event will reflect the requirement by showing a "Y" in the note field. The same logic follows for the letter, recall and follow-up date fields

So far, the event flow is:

- 1) At placement – value obtained for the Dynamic score
- 2) Main event , 01 – Attempt
- 3) 1st sub event , A – Called Home

Now, let's put a 6 next to the 1st Sub Event 'Called Home' to create a 2nd Sub Event.



Three possibilities have already been entered.

4) Second sub events are 2 character alpha fields

We need to update the information for the 2nd sub event, so place a 2 in front of the first defined 2nd sub event 'AA – No answer' and enter.



A dynamic score code, smart code and notes are available at the 2nd sub level. Update as needed.

You have now set up an entire flow of events for an event cycle - Attempt/Called Home/No Answer!

So, the event flow looks like this:

- 1) Event at placement – value obtained for the Dynamic score
- 2) Main event, 01 – Attempt
- 3) 1st sub event, A – Called Home
- 4) 2nd sub event, AA – No Answer

Once you have completed the set up for ALL 3 levels, you can now see how these events present themselves to the user.

Below is the main detail screen for an account:

RMEx QUANTRAX CORPORATION INC.

ENTER
ATTN
PAGEUP
PAGEDN
EXIT
HELP
CALENDAR

Company # 99 Case # 000016094 Get Primary Next
Client Number 123068 DELIGHT TEST CLIENT
Owner DELT Worker DELT Split DELT
Client Acct # DIALER TEST ACCOUNT

Home Phone 561 - 969 - 2213
Work Phone
Cell Phone
Follow Up Date 2/08/11
Promise Amount .00

INQUIRY 001 M

Guarantor None ▼ KELLER JEFF TEST ACCT
Extra Address
Street Address
City/State/Zip 123 BLUE ST SACRAMENTO MD 95814
Email PATL@ACL.COM
Place of Employment Home
Social Security No XXX-XX-0000 Date of Birth 2/10/2011
Patient (L/F)
X-Reference (L/F)
Spouse (Last/First)
ACat Status RM Once
Letters Pending F4 A1 Cred.Rept Do not Report

Amount Placed 400.00
Balance 200.00
Total Balance 200.00
No. Of Accts 1
No. Paid in Full 0
Date Placed 5/12/10
Last Transaction 6/12/08
Last Worked 2/04/11
Last Letter A1 1/18/11
Last Payment 200.00
L. Pay Date 11/15/10
PD Check \$ 10.00
PD Check Date 2/22/11

Smart Code
Description Codes SHOW DESCRIPTION
Code Description
A1
93
Payments
Date Description Amount
11/15/10 Pd. Agcy 100.00
11/15/10 Pd. Agcy 100.00

Close Code Closed Date

Notes					Temporary Notes	
Time	Date	Code	Note	User	Date	Note
09:32	02/09/11	cc	Full CC Info Viewed	DEL *	02/04/11	TEMP NOTES FIELD
09:33	02/09/11	cc	Full CC Info Viewed	DEL		
09:33	02/09/11	cc	CC info was deleted	DEL		
09:33	02/09/11	cc	Full CC Info Viewed	DEL		
09:34	02/09/11	cc	Full CC Info Viewed	DEL		

F1: Inquiry F2: Attorney F3: Duplication F4: Skip F5: Linked Accts F6: Full Legal F7: Exit F8: Contacts F9: P/A F10: Second Scrn F11: Notes
F12: Update F14: DC F15: Phone F16: Other Info F17: Legal F20: Recalls F21: Primary F22: Client Info F23: Payments F24: Client Type

Click on the events button in the top right hand corner. The next window will be displayed to the user.



Click on 'Attempt' and the following screen will appear.

RMEx QUANTRAX CORPORATION INC.

Company # 99 Case # 000016949 Get Primary

Client Number 000002 ST MARYS HOSPITAL1234567890123456789012

Owner 2 4 Worker 2 4 Split

Client Acct #

Home Phone

Work Phone

Cell Phone

Follow Up Date

Promise Amount

INQUIRY 000 A

Events

Guarantor None MAAB WIN

Extra Address

Street Address 1 MAIN ST

City/State/Zip ROANOKE VA 22405

Email PATL@QUANTRAX.COM

Place of Employment Home

Social Security No 000-00-0000 Date of Birth 1/21/1959

Patient (L/F) MAAB WIN

X-Reference (L/F)

Spouse (Last/First)

ACat Status RM Once

Letters Pending Cred.Rept Do not Report

Amount

Balance

Total Bal

No. Of Ac

No. Paid i

Date Plac

Last Tran

Last Work

Last Lett

Last Paym

L. Pay Dat

PD Check

PD Check

Close Code

Closed Date

Time	Date	Code	Note
13:00	10/21/10		SCS2
17:09	12/22/10	9B	481848 BANNER
17:15	12/22/10	9C	Home Ph - 000-0000
17:16	12/22/10	9C	Home Ph - 301 555-1212
15:05	12/30/10		START 2 SCS PL AT

Events - Windows Internet Explorer

http://222.165.139.22/events/default.aspx?p=1&lvl=0

RMEx

Attempt...

- CALLLED HOME
- CALLLED WORK
- CALLLED RELATIVE

F1: Inquiry F2: Attorney F3: Duplication F4: Skip F5: Linked Accts F6: Full Legal F7: Exit F8: Contacts F9: PIA F10: Second Scrn F11: Notes

F12: Update F14: DC F15: Phone F16: Other Info F17: Legal F20: Recalls F21: Primary F22: Client Info F23: Payments F24: Client Type

As shown above, the user has clicked on the Main Event – Attempt and the 1st sub level options are presented to the user. As you can see, the process has begun and the user does not enter a smart code! The user will continue to filter through the options presented until they reach the end of the event cycle.

The screenshot displays the RMEEx software interface for an 'Attempt' record. The header shows the RMEEx logo and a keyboard graphic. The form contains the following fields:

- Smart Code: 603
- Promise Amount: [] .00 Format
- Follow-Up Date: [] MMDDYY format [Calendar icon]
- Send Letter: []
- Recall: []
- NOTES: [Dropdown] [Text Area]

An 'Update' button is located at the bottom left of the form.

Recall that smart code 603 was applied for the main event – Attempt.
Specific fields are available for the user as well as a calendar feature.

Lastly, expanding events can be controlled at the client level. See below.

RMEx **QUANTRAX CORPORATION INC.**

Client Update

Company Name IOU OWE-IT COLLECT SERVICES, INC. RMEx
 Client Code 000002

Information to be displayed
 when account is presented

Payments allowed (N=No, B=only adjustments)
 Allow zero or negative placements (Y)
 Special link code
 Hold Contact and Smart Code series (C,S,B)
 UDW to be displayed when account is presented
 Smart codes on links (N=No)
 Bypass 30-day check for credit reporting-Y
 Analytical Attributes code
 Get permission to call using I-Tel (Y)
 Expand events (ANb)

F1-New Selection F3-Search F7-Exit F12 OR ENTER-Update Information

- ✓ Expand events (A N or b): A to always expand events, N to never expand and leave blank to control expanding at another level.

Now it is time to move on to **Attempt/Called Work/No Answer**, etc...setting up all possible events needed.

NOTE: Dynamic scoring and Events should be run together so that you can maximize the benefits of Dynamic Scoring and take advantage of future enhancements.

Changes to Events

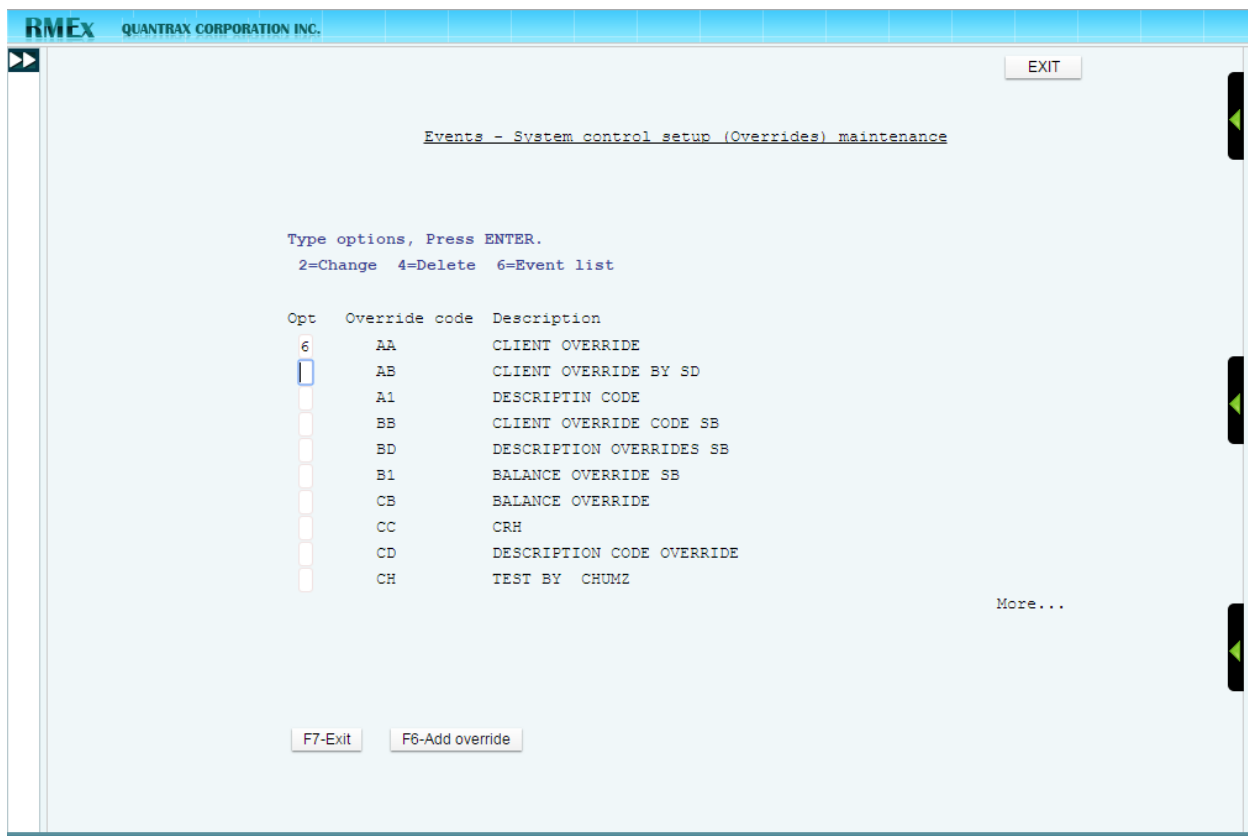
We have also added the following flexibility.

- We will allow the description of the main events to be changed.
- We have added two new options to the Events System control file update. The option “Events - System control setup (Default)” has two new function key selections;
 - ✓ Insert sub level
 - ✓ Copy path

These must be used with caution.

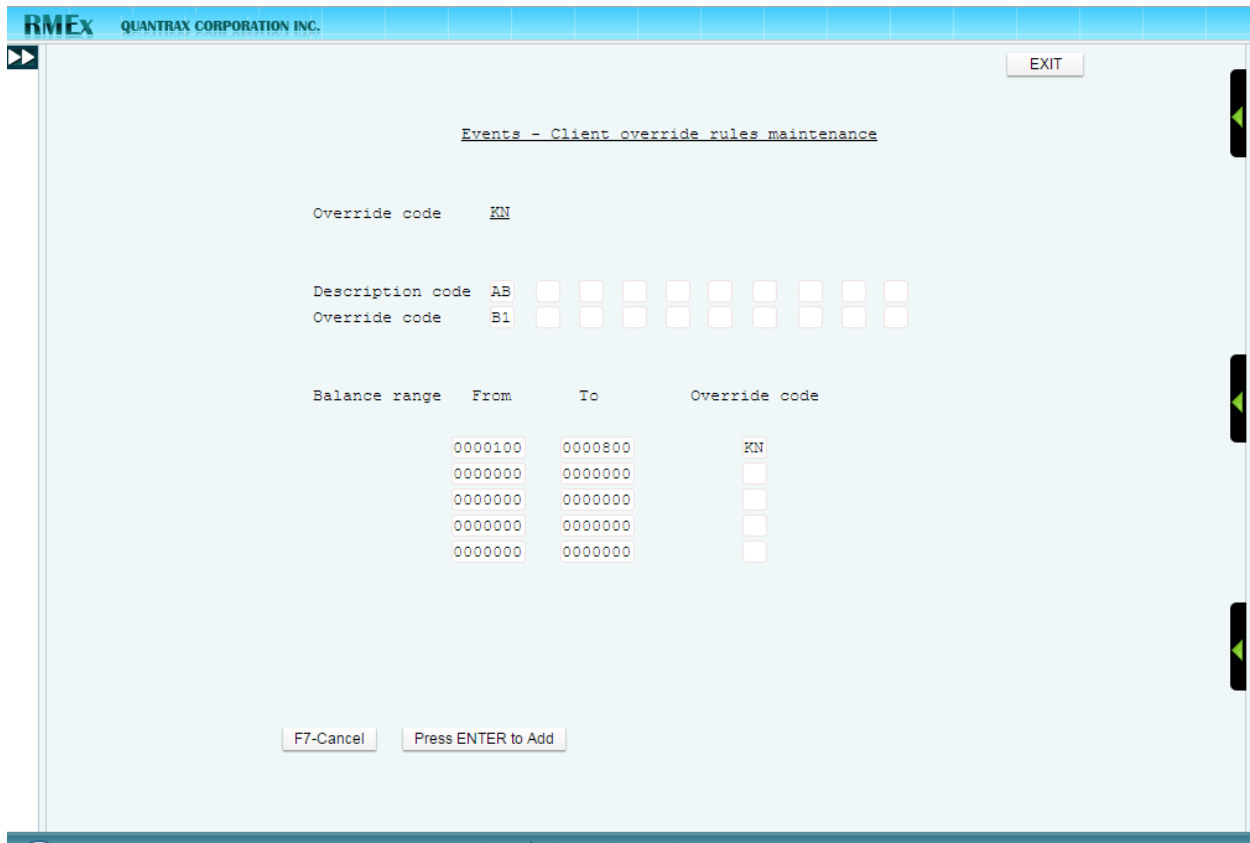
They were added to make changes to the event structure easier, but we strongly suggest you contact our support team prior to using these options.

- We now allow smart code overrides to be associated with events
- We have introduced a new override at the user level. This is accessed on the second screen of system security. The “Events override” can be used to allow event overrides to be defined by User ID. When there is no client level override, the user override will be checked and used if available. This will allow you to change screens and processes based on skill levels.



What are ‘Event Override Codes’?

Event Overrides can be setup based on Description Code(s), Balance Range(s) or the Client Code. The system has overrides for up to ten Description Codes and five Balance Ranges.



The rules for priority are as follows:

- ✓ The client can define a special event override code for a specific client.
- ✓ The client can define new override codes for different balances and description codes for the above client override.
- ✓ Then when the collector tries to access an account through an event, they will be given an event/sub event list according to the matching description codes, balance and the client code.