

Events Model – Getting started with the Events Model

- The Events Model consists of Main Events, Sub Events and the Smart Codes that the Events Model uses
- The Events model will be installed in Company 98, so you will need to do some prep work:
 - You must have the GUI product installed in order to actually run the Events however, you do not need GUI to set up the Events system controls
 - Company 98 must be created on your system
 - Check your current Events and Smart Code system controls for Company 98 to make sure you are willing to have them replaced with the Model

NOTE: If you have issues with replacing the above information in Company 98, DO NOT proceed. Contact Quantrax

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	Y	100	
<input type="checkbox"/>	02	Answering machine		100	
<input type="checkbox"/>	03	Contact	Y	100	
<input type="checkbox"/>	04	RPC	Y	100	
<input type="checkbox"/>	05	Promise/Payment		100	
<input type="checkbox"/>	06	Dispute/Attorney/BK/Deceased		100	
<input type="checkbox"/>	07	Legal request		100	
<input type="checkbox"/>	08	Skip tracing		100	
<input type="checkbox"/>	09	Written correspondence	Y	100	
<input type="checkbox"/>	10	Client interaction	Y	100	
<input type="checkbox"/>	11	Manager talk off	Y	100	

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Events – This feature is used to insure standardized documentation for all accounts

- You must download the file named EVENTMODEL from the Quantrax FTP site. File location -> public folder -> RMEx2.2 folder -> Events Model folder
- Install the file to SCFIX
- From a command line type in CALL COM98RMCL
- The Events model is now installed in Company 98 on your system

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- You need to review the Events and Smart Codes in Company 98 and make any changes needed

NOTE: To review Smart Codes, go to the Smart Code system controls and hit F3-Search. This will list all the Smart Codes used in the Events Model

NOTE: See the Events doc for mass changing Smart Codes in the Events Model

- Considerations for changes:
 - Using Smart Codes you may already have set up instead of the Smart Codes created by Quantrax
 - Changing the note verbiage
 - Adding Dynamic Scores
 - Creating specific processes unique to your office
 - Using any of the additional Main Events not currently utilized in the Events Model

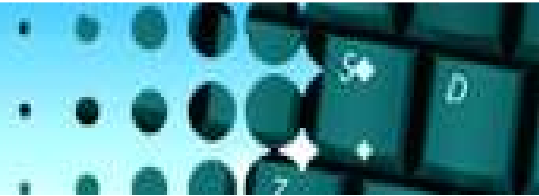
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- Once you are happy with the Model, you can then copy the Events and/or Smart Codes to any production Company

NOTE: To copy the Events, there is an option on the Events system control that will allow you to duplicate (copy) the Events from Company 98 to any Company of your choosing

NOTE: Make sure no Events exist in the Company you are copying to

- For the Smart Codes, you will need to copy them 1 at a time using the copy feature in the Smart Code system controls

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