

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

- You must have GUI installed to use the Events feature, however the Events System Controls can be set up at anytime
- Main Events are system defined
- Sub-events are user defined
- There are 11 Main Events
- Each Main Event allows up to 26 Sub-events per Main event
- Each Sub-event allows up to 26 Sub-events
- You can have up to 9 Sub-events levels
- You must assign a Smart Code to all Events

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	

Bottom

F7-Exit

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- Main Events features:

- You must assign a Smart Code

NOTE: Even though a Smart Code is required, you have the option to “not” apply it if the Event is expandable

- You can apply a Dynamic Score

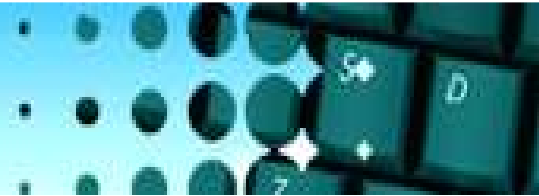
- You can add standardized notes

- You can choose to “hide” or not display a specific Event

- You can choose to expand an Event to only one Sub-event level or all levels

Event Maintenance - First level

Event code	<u>06</u>
Description	<u>Dispute/Attorney/BK/Deceased</u>
Smart code	<input type="checkbox"/> Do not apply if expandable(N) <input type="checkbox"/>
Dynamic score	<input type="text"/>
Notes	<input type="text"/> <input type="text"/> <input type="text"/>
Do not display (N)	<input type="checkbox"/> Expand always (Y/1) <input type="checkbox"/>
Notes	Letter N Recall
Follow up date	N



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- Sub-event features:
- You must assign a Smart Code

NOTE: Even though a Smart Code is required, you have the option to “not” apply it if the Event is expandable

- You can apply a Dynamic Score
- You can add standardized notes
- You can choose to have the Sub-event return to the same Sub-event level after it has been updated

Event Maintenance - Sub levels

Main Event	Dispute/Attorney/BK/Deceased		
Level	1		
Sub-event path	A		
Sub-event description	<input type="text"/>		
Smart code	<input type="checkbox"/>	Do not apply if expandable(N)	<input type="checkbox"/>
Dynamic score code	<input type="text"/>		
Notes	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
Return to the sub level(Y)	<input type="checkbox"/>		
Notes	Letter	Recall	Follow-up date

 ENTER to Update

Events

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- Smart code change in Events feature:
- This feature is used to change/replace the existing Smart Codes within the Main Events and Sub-events to another Smart Code

NOTE: The existing Smart Code on ANY Main Event and Sub-event that currently uses the existing Smart Code will be changed

Smart code change in Events

Existing smart code

New smart code

F7-Exit

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- Event expanding rules features:

- Allows you to set up additional expansion rules based on whether an account is legal or non-legal

- Allows you to set up additional expansion rules based on up to 5 different linked balance ranges

- Additional Event expanding rules features can be found on the System Controls for the following:

- Client Update
- UserID
- ACat
- Description Code
- Account Status

Event expanding rules

Set rule on	Expanding rule (ANb)		
Legal accounts	<input type="checkbox"/>		
Non-legal accounts	<input type="checkbox"/>		
Linked balance range,			
<input type="text"/>	to	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	to	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	to	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	to	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	to	<input type="text"/>	<input type="checkbox"/>

F7-Cancel
Enter-Add/Update

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- This screen shot shows how the expansion field appears on the Additional System Controls

NOTES: All of the expansion rules allow you to control Event expansion based on a specific account level circumstance. A=always expand, N=do not expand, blank=no rule applies for this system control

When using expansion rules, the rules are considered at the Main Event level. Even if you have the Main Event field “Do not apply if Expandable (N)” set to “N”, the Smart Code will apply if any expansion rule is set up to NOT expand. This is to ensure all accounts get worked, so you want to make sure the Smart Code on the Main Event is set up as an attempt, contact, etc.

Expand events (ANb)

