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

- Company 98 must be created on your system

- Access Events system control from System control menu (3)

- 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
	01	Attempt	Y	100	
	02	Answering machine		100	
	03	Contact	Y	100	
	04	RPC	Y	100	
	05	Promise/Payment		100	
	06	Dispute/Attorney/BK/Deceased		100	
	07	Legal request		100	
	08	Skip tracing		100	
	09	Written correspondence	Y	100	
	10	Client interaction	Y	100	
	11	Manager talk off	Y	100	

Bottom

F7-Exit

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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

• 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

```
              Event system control - First level


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


Opt  Event Code  Description                        Expand   Smart code  Dyn. Sc
 □        01      Attempt                              Y          100
 □        02      Answering machine                               100
 □        03      Contact                              Y          100
 □        04      RPC                                  Y          100
 □        05      Promise/Payment                                 100
 □        06      Dispute/Attorney/BK/Deceased                    100
 □        07      Legal request                                   100
 □        08      Skip tracing                                    100
 □        09      Written correspondence               Y          100
 □        10      Client interaction                   Y          100
 □        11      Manager talk off                     Y          100



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 F7-Exit
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Events – This feature is used to insure standardized documentation for all accounts

• 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

• 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 utilized in the Events Model

```
                    Event system control - First level



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


Opt  Event Code  Description                    Expand   Smart code   Dyn. Sc
 □       01       Attempt                          Y         100
 □       02       Answering machine                          100
 □       03       Contact                          Y         100
 □       04       RPC                              Y         100
 □       05       Promise/Payment                            100
 □       06       Dispute/Attorney/BK/Deceased               100
 □       07       Legal request                              100
 □       08       Skip tracing                               100
 □       09       Written correspondence           Y         100
 □       10       Client interaction               Y         100
 □       11       Manager talk off                 Y         100




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F7-Exit
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Events – This feature is used to insure standardized documentation for all accounts

• 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

```
                Event system control - First level


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


Opt  Event Code  Description                      Expand   Smart code  Dyn. Sc
 □       01       Attempt                            Y         100
 □       02       Answering machine                            100
 □       03       Contact                            Y         100
 □       04       RPC                                Y         100
 □       05       Promise/Payment                              100
 □       06       Dispute/Attorney/BK/Deceased                 100
 □       07       Legal request                                100
 □       08       Skip tracing                                 100
 □       09       Written correspondence             Y         100
 □       10       Client interaction                 Y         100
 □       11       Manager talk off                   Y         100




                                                                     Bottom

 F7-Exit
```

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

- You must have GUI installed to use the Events feature

- 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

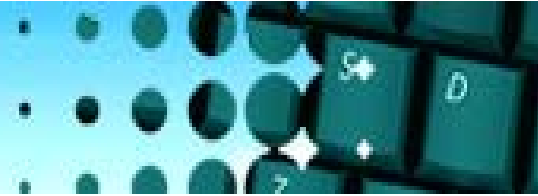- You must assign a Smart Code to all Events

Event system control - First level

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

Opt	Event Code	Description	Expand	Smart code	Dyn. Sc
☐	01	Attempt	Y	100	
☐	02	Answering machine		100	
☐	03	Contact	Y	100	
☐	04	RPC	Y	100	
☐	05	Promise/Payment		100	
☐	06	Dispute/Attorney/BK/Deceased		100	
☐	07	Legal request		100	
☐	08	Skip tracing		100	
☐	09	Written correspondence	Y	100	
☐	10	Client interaction	Y	100	
☐	11	Manager talk off	Y	100	

Bottom

F7-Exit

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

• 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 (if it is setup)

• 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 Maintenace - First level

Event code   06

Description   Dispute/Attorney/BK/Deceased

Smart code   [   ]   Do not apply if expandable(N)   [ ]

Dynamic score   [   ]

Notes   [   ]
                 [   ]
                 [   ]

Do not display(N)   [ ]   Expand always(Y/1)   [ ]

Notes   Letter N   Recall
Follow up date   N

F7-Cancel   Enter-Update
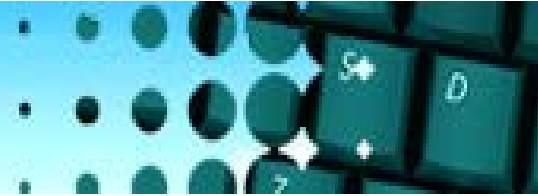
Events – This feature is used to insure standardized documentation for all accounts

- 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     [                                    ]

    Smart code              [    ]    Do not apply if expandable(N)  [ ]

    Dynamic score code      [    ]

    Notes                     [                                    ]
                              [                                    ]
                              [                                    ]

    Return to the sub level(Y) [ ]

    Notes         Letter      Recall      Follow-up date


   [F7-Exit]      ENTER to Update
```
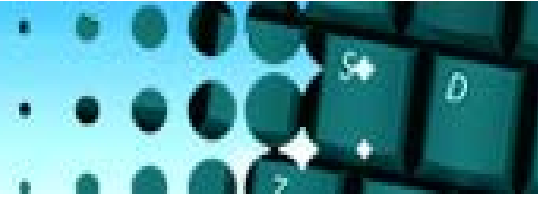
7
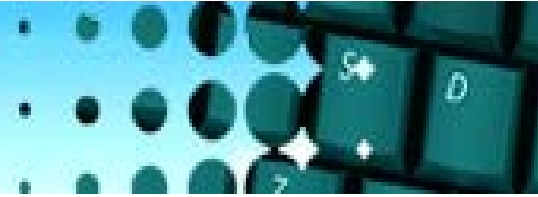
Events – This feature is used to insure standardized documentation for all accounts

• 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	☐
Non-legal accounts	☐

Linked balance range,

____ to ____	☐
____ to ____	☐
____ to ____	☐
____ to ____	☐
____ to ____	☐

F7-Cancel   **Enter-Add/Update**

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

• 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

Expand events (ANb) ☐

• 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.