

Events – System Defined Events – Main Events

- The Main Events are System Defined
- You can create Sub Events which are user defined.
- This screen shows you if the Events expand, what Smart Code is being applied and what Dynamic Score Code is associated with this Event.
- The examples used in the following documentation consist of 3 levels on Events.
- To change/edit the current Event enter a 2 in the Opt field.

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....		302	4001
<input type="checkbox"/>	02	Answering machine	Y	300	
<input type="checkbox"/>	03	Contact		201	4004
<input type="checkbox"/>	04	RPC		101	4001
<input type="checkbox"/>	05	Promise/Payment	1	101	
<input type="checkbox"/>	06	Dispute/Attorney/BK/Deceased	1	601	7001
<input type="checkbox"/>	07	Legal request		150	7001
<input type="checkbox"/>	08	Skip tracing		201	7001
<input type="checkbox"/>	09	Written correspondence		102	7003
<input type="checkbox"/>	10	Client interaction		800	4001
					More...

F7-Exit

Events – Control how the Event behaves and what the agent can or cannot do.

- When accessed the Event Code and description will appear
- The user defined fields are:
Smart Code (mandatory) This Smart Code will be applied when this Event is used. We are applying 302.
- If you have several levels of Events and do not want this Smart Code to apply, put a “N” in “Do not apply if expandable”. We do not want the 302 to apply.
- Each Event can refer to a Dynamic Score Code (not mandatory) which will increase or decrease the Dynamic Score on the account. We are applying 4001.
- You can add up to 3 standard note lines when this Event is applied. We are applying 3 Notes.

Event Maintenance - First level

Event code	<u>01</u>		
Description	<u>Attempt....</u>		
Smart code	<input type="text" value="302"/>	Do not apply if expandable(N)	<input type="text" value="N"/>
Dynamic score	<input type="text" value="04001"/>		
Notes	<input type="text" value="TEST NOTE 01 ATTEMPT"/> <input type="text" value="TEST NOTE 02 ATTEMPT"/> <input type="text" value="TEST NOTE 03 ATTEMPT"/>		
Do not display(N)	<input type="checkbox"/>	Expand always(Y/1)	<input type="checkbox"/>
Notes	<input type="text" value="N"/>	Letter N	Recall N
Follow up date	<input type="text" value="N"/>		

Events – Control how the Event behaves and what the agent can or cannot do.

- Expandable Always – This field is only used to override the expansion rules set up for: UserID, ACat Code, Account Status Code, Description Code, Client or Expansion Rules option. To override the above options enter a Y or 1. We are not overriding the above options.

- The four fields at the bottom of this screen present you with important information from the Smart Code that is being applied. It shows you what is set up in the Notes, Letter, Recall, and Follow-up date fields of the Smart Code.

- Example: The 302 Smart Code is set up to not allow the agent to enter any notes, send a letter, set a recall time or enter a follow-up date so you see all N's in the screen.

- NOTE: All Event screens (no matter what level) are designed the same way.

Event Maintenance - First level

Event code	<u>01</u>			
Description	<u>Attempt....</u>			
Smart code	<input type="text" value="302"/>	Do not apply if expandable(N)	<input type="text" value="N"/>	
Dynamic score	<input type="text" value="04001"/>			
Notes	<input type="text" value="TEST NOTE 01 ATTEMPT"/> <input type="text" value="TEST NOTE 02 ATTEMPT"/> <input type="text" value="TEST NOTE 03 ATTEMPT"/>			
Do not display(N)	<input type="checkbox"/>	Expand always(Y/1)	<input type="checkbox"/>	
Notes	N	Letter N	Recall N	
Follow up date	N			

Events – Creating Sub-Events

- To create/edit next level Sub-Events enter a 6 in the Opt field.
- Sub-Events are leveled by alpha characters. Example 1st level is a 1 character alpha character, 2nd level is a set of 2 alpha characters, 3rd level is a set of 3 alpha characters and so on

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....		302	4001
<input type="checkbox"/>	02	Answering machine	Y	300	
<input type="checkbox"/>	03	Contact		201	4004
<input type="checkbox"/>	04	RPC		101	4001
<input type="checkbox"/>	05	Promise/Payment	1	101	
<input type="checkbox"/>	06	Dispute/Attorney/BK/Deceased	1	601	7001
<input type="checkbox"/>	07	Legal request		150	7001
<input type="checkbox"/>	08	Skip tracing		201	7001
<input type="checkbox"/>	09	Written correspondence		102	7003
<input type="checkbox"/>	10	Client interaction		800	4001
					More...

F7-Exit

Events – Creating Sub Events continued...

- You will be presented with a list of next level Sub-Events.
- As with the Main Event a 2 will allow you to change/edit the current level Sub-Events and a 6 will allow you to create/edit next level Sub-Events.
- In this example, the Main Event “Attempt” has 4 Sub-Events. We will put a 2 in the Opt field for A - CALLED HOME To review the set up and then a 6 in the Opt field to access the next level

Event system control - Sub Level

Main event Attempt.... Level 01

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

Sub event			Smart code	Dyn.Score
Opt	path	Description		
<input type="checkbox"/>	A	CALLED HOME	303	4002
<input type="checkbox"/>	B	CALLED WORK	101	7001
<input type="checkbox"/>	C	CALLED RELATIVE	200	
<input type="checkbox"/>	D	CALLED NEIGHBORS	180	

Bottom

F7-Exit F6-Add sub event

Events – Creating Sub Events continued...

- In the A - CALLED HOME Sub-Event we are:
- Not applying Smart Code 303 because this Sub-Event is expandable
- Adding Dynamic Score Code 4002

Event Maintenance - Sub levels

Main Event	Attempt....		
Level	1		
Sub-event path	A		
Sub-event description	<input type="text" value="CALLED HOME"/>		
Smart code	<input type="text" value="303"/>	Do not apply if expandable(N)	<input type="checkbox"/>
Dynamic score code	<input type="text" value="4002"/>		
Notes	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
Notes	N	Letter	N Recall N
Follow-up date	N		

 ENTER to Update

Events – Creating Sub Events continued....

- In the AA - NO ANSWER Sub-Event we are:
- Applying Smart Code 121 because this Sub-Event is not expandable.
- Adding Dynamic Score Code 7005
- The steps can be repeated to create as many Sub-Event levels as needed
- With Events the possibilities are endless! (well almost)

Event Maintenance - Sub levels

Main Event	Attempt....
Level	2
Sub-event path	AA
Sub-event description	<input type="text" value="NO ANSWER"/>
Smart code	<input type="text" value="121"/> Do not apply if expandable(N) <input type="checkbox"/>
Dynamic score code	<input type="text" value="7005"/>
Notes	<input type="text"/> <input type="text"/> <input type="text"/>
Notes	N Letter Recall N
Follow-up date	N

F7-Exit ENTER to Update

Events – Creating Sub Events continued...

- Based on the set up just described what will happen when a User follows the Event path:
- The user selects Events, Attempt, Called Home, No answer
- The system will apply Dynamic Score Code 4001 and 3 Note lines from the main Event Attempt. It will apply Dynamic Score Code 4002 from Called Home Sub-Event and will apply Dynamic Score Code 7005, Apply Smart Code and allow the user to send a letter if he chooses from the No Answer Sub-Event.

Event Maintenance - Sub levels

Main Event	Attempt....
Level	2
Sub-event path	AA
Sub-event description	<input type="text" value="NO ANSWER"/>
Smart code	<input type="text" value="121"/> Do not apply if expandable(N) <input type="checkbox"/>
Dynamic score code	<input type="text" value="7005"/>
Notes	<input type="text"/> <input type="text"/> <input type="text"/>
Notes	N Letter Recall N
Follow-up date	N

F7-Exit ENTER to Update



Events – Expanding Rules – Make Events behave differently

- You can stop Events from expanding based from several different areas.
- At Client Level, UserID, ACat Code, Description Code, Account Status Code and Expanding Rule option (which will look at Legal and non legal accounts and at linked balances).

Dynamic Scoring and Event

1. **Dynamic score - Smart Code setup**
2. **Dynamic score - System control setup**
3. **Events - Expanding rule setup**
4. **Events - System control setup**
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.

Select an Option

F7-Cancel

Events – Expanding Rules continued....

- At Client Level, UserID, ACat Code, Description Code, Account Status Code you will have the option shown here.
- An “A” - expand always, an “N” - do not expand and a “blank” – expand if not stopped. However, IF at the Event Level, you have a “Y” or as “1”, the “N” rule will be ignored.
- An “A” will always override an “N”. For example, you have overrides at the Client and and the UserID. You have an “A” at the Client and “N” at the UserID, the “A” at the Client Level will override the “N” at the UserID
- IF, you had “N” at the Client and at the UserID and a “Y” at the Main Event. The “Y” would override the “N” at the Client level.

Expand events (ANb)

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

Events – Expanding Rules continued....

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

- Specify by putting an “A”, or “N” to control the Event based on one or all of the following options.