

## Adding New Activity Codes

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### Overview

In CMPOnline, activity codes allow you to mark important events for each case file. Understanding activity codes allows you to use CMPOnline to its fullest potential, including automating reviews, transactions, and more. This document details first how to create an activity code and then provides instructions on how to apply that code to a case file.

### Adding Activity Codes to the System

- Navigate to Administration > Lookups > Case File > Activity Codes.
- Click “Add New”.

#### **Required Fields:**

- Enter a **Description**. *This is how you will search for your code. Be descriptive, but concise.*

#### **Optional Fields:**

- Ensure the “**Inactive?**” box is not checked.
- Check the “**Comments Required?**” box if you would like to require users to include a comment when adding this code to a file.
- Check the “**Opponent Required?**” box if you would like to require users to select an opponent when adding this code to a file.
- Check the “**Legal Status?**” box if you would like to mark this code as a high priority legal status.
- In the “**Default Note Text**” box, enter any text you would like to automatically populate when adding this code to a case file. *This is editable before saving to the case file. Enter text here that would appear in most notes for this activity code.*
- If you would like a review to automatically be entered upon adding this activity code, select that code from the “**Default Follow Up Review**” dropdown menu.
- If you attempt to make contact before adding this review, you can select that attempt type from the “**Contact Attempt Type**” dropdown menu.

#### **Adding a Transaction**

- Check the “**Add Transaction?**” checkbox.
- Select the transaction code you would like to add to the file from the “**Transaction Type/Code**” dropdown menu.
- Enter the **Default Amount** for the transaction above.

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### Adding Activity Codes to a Case File

- Navigate to Case File > Activity.
- Click “Add New”.
- Select an Activity Code from the Activity Code dropdown menu.
- Enter a comment if needed.
- Change the note text if needed.
- Select which opponent the activity code applies to from the Opponent dropdown.
- Change any Transaction details if needed.
- Change any Review details if needed.
- Add any images corresponding to the code by either selecting an existing image from the case file or adding a new image.
- Click “Save”.

### Troubleshooting

#### **Cannot see an added activity code in the activity grid?**

- Ensure all steps were followed from the *Adding Activity Codes to a Case File* instructions above.
- Ensure the correct filters are checked above the grid.
- Ensure the activity code was not marked Inactive in the Activity Codes settings.

### Questions?

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