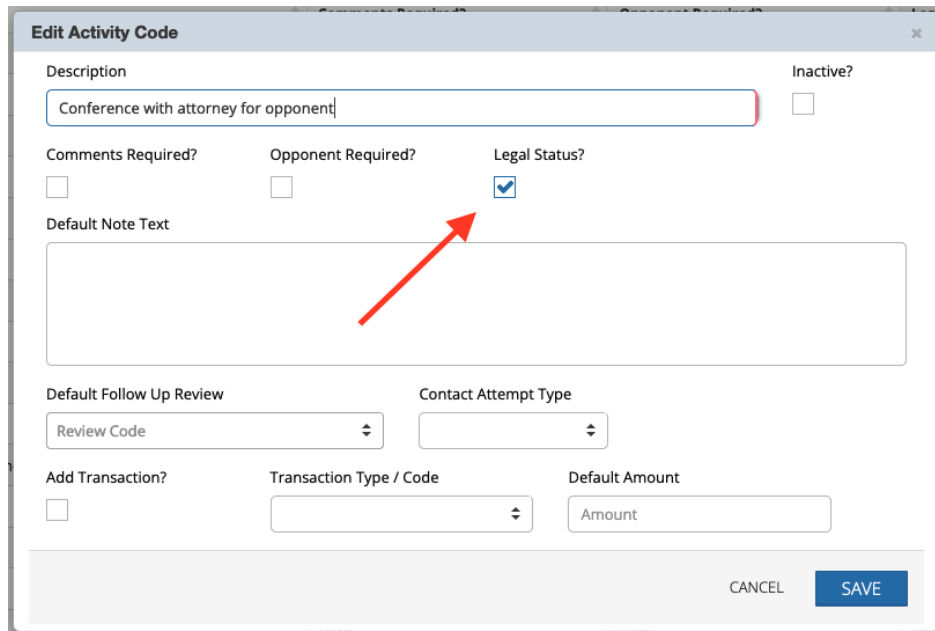


Adding a Legal Status

This document details the procedure to configure and use legal statuses in CMPOnline.

Creating a Legal Status Code

- Start by navigating to Administration > Lookups > Case File > Activity.
- Click “Add new”
 - Enter a Description
 - Check the “Legal Status?” Box *(Shown Below)*
 - Optional Fields Include:
 - Default Note
 - Default Follow Up Review
 - Contact Attempt Type
 - “Add Transaction?” box
 - Transaction Type / Code
 - Default Amount
 - Click Save

A screenshot of the "Edit Activity Code" form in a web application. The form has a title bar with "Edit Activity Code" and a close button. It contains several fields and checkboxes. The "Description" field is a text input containing "Conference with attorney for opponent". To its right is an "Inactive?" checkbox, which is unchecked. Below the description are three checkboxes: "Comments Required?" (unchecked), "Opponent Required?" (unchecked), and "Legal Status?" (checked). A red arrow points to the "Legal Status?" checkbox. Below these is a "Default Note Text" text area. Further down are two dropdown menus: "Default Follow Up Review" (set to "Review Code") and "Contact Attempt Type" (empty). At the bottom are three more fields: "Add Transaction?" (unchecked), "Transaction Type / Code" (dropdown), and "Default Amount" (text input with "Amount" placeholder). At the bottom right are "CANCEL" and "SAVE" buttons.

Adding a Legal Status

Using a Legal Status

- Start by navigating to Case File > Activity
- Click Add New
 - Choose the Activity Code set with the Legal Status property from the previous steps.
 - Optional Fields:
 - Comment
 - Note
 - Debtor
 - Follow Up Review
 - Existing or New Image
 - Click Save
- Save the Case File
- You will now be able to view the last legal status on the main case file screen. *(Shown Below)*

Last Letter: 04/04/2022, CFPB Model Debt Collection Validation Notice
Last Pleading: no pleadings
Last Legal Status: 04/15/2022, Conference with attorney for opponent
Total Payments: \$100.00 [\(view\)](#)

Legal Statuses in Custom Reporting

Once a legal status is used in the activity on a case file, you can also pull this data in your reports under custom reporting using the “Last Legal Status” fieldset. [For more information about Custom Reporting, please see our help document.](#)

Questions?

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