

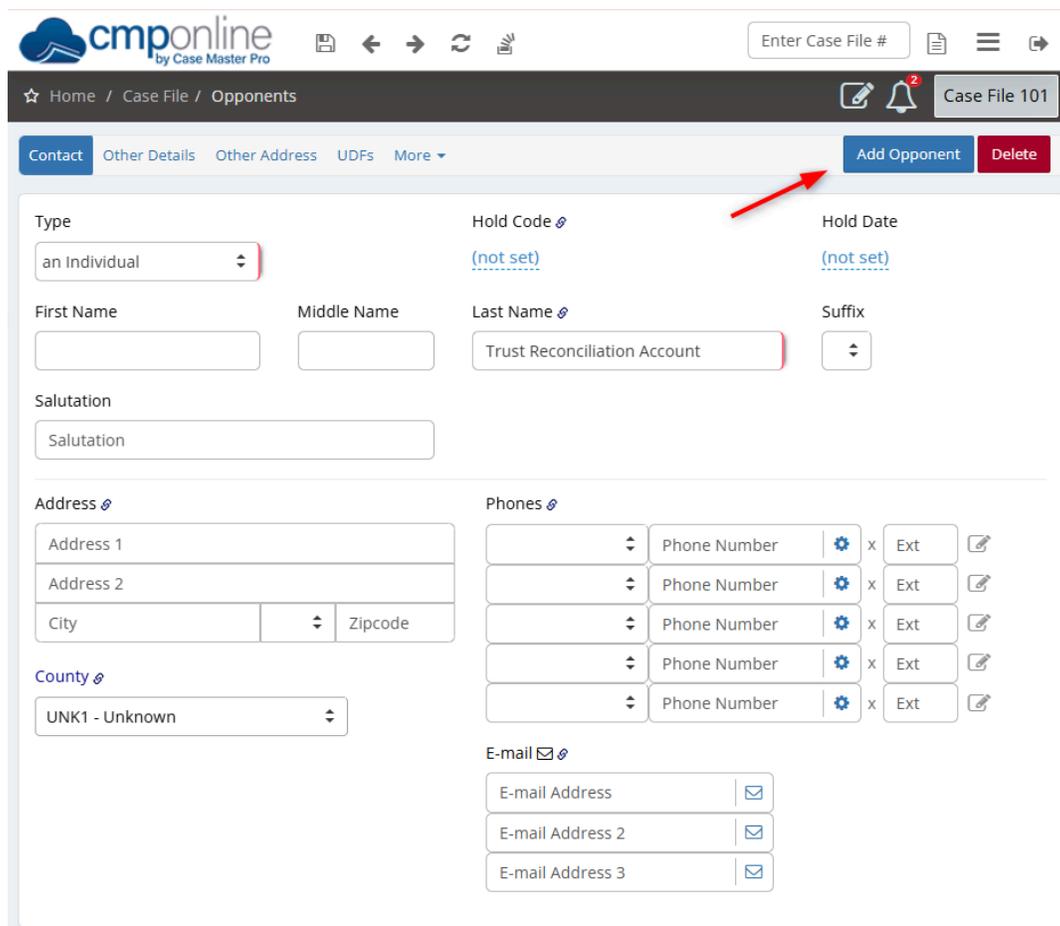
Adding an Opponent / Debtor

Overview

This document provides step-by-step instructions for adding an opponent in CMPOne to guide users through the process efficiently and accurately. Please note that certain areas of the opponent screens are customizable and can be tailored to meet your firm's needs, including custom User Defined Fields. Additionally, the label for 'Opponent' can be customized based on the Case Type [Terminology Settings](#)—for example, it might appear as Parties, Defendants, Debtors, or other terms as needed.

Add an Opponent / Debtor

- Navigate to Case File > Opponents.
- Click the Add Opponent button at the top-right of the screen (indicated below).
- You will be brought to a new opponent screen to fill in appropriate information.

A screenshot of the CMPOne web application interface. The top navigation bar includes the 'cmponline by Case Master Pro' logo, navigation icons, and a search box for 'Enter Case File #'. Below the navigation bar, the breadcrumb trail shows 'Home / Case File / Opponents'. A secondary navigation bar contains tabs for 'Contact', 'Other Details', 'Other Address', 'UDFs', and 'More'. On the right side of this bar are 'Add Opponent' and 'Delete' buttons. A red arrow points to the 'Add Opponent' button. The main form area is divided into several sections: 'Type' (dropdown menu with 'an Individual' selected), 'Hold Code' (text field with '(not set)'), and 'Hold Date' (text field with '(not set)'). Below these are fields for 'First Name', 'Middle Name', 'Last Name' (containing 'Trust Reconciliation Account'), and 'Suffix' (dropdown menu). There is also a 'Salutation' field. The 'Address' section includes fields for 'Address 1', 'Address 2', 'City', and 'Zipcode'. The 'County' section has a dropdown menu with 'UNK1 - Unknown' selected. The 'Phones' section contains a table with five rows, each with a dropdown menu, 'Phone Number', a gear icon, 'x', 'Ext', and a delete icon. The 'E-mail' section has three rows, each with 'E-mail Address' and an envelope icon.

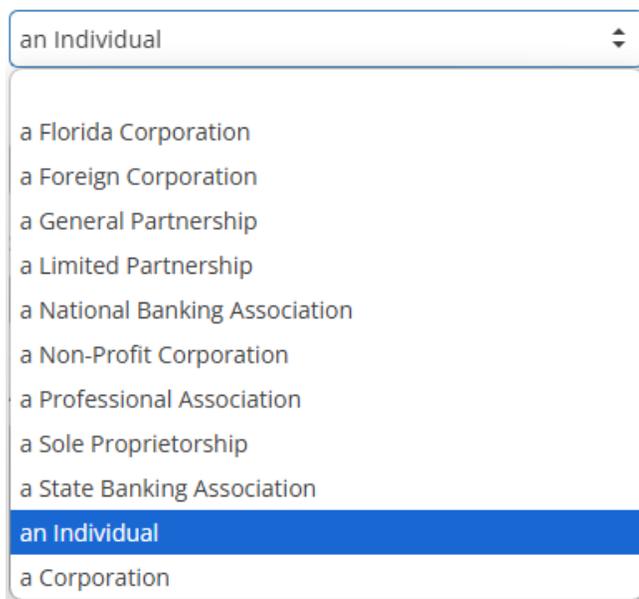
Adding an Opponent / Debtor

Contact Tab

Location: Case File > Opponents > [Opponent Name] > Contact Card

- Type: Select the Type of debtor you are adding to the case file. Selecting the Type will display various fields for the specific type.
Example: When selecting 'a Corporation', the First/Middle/Last fields will change to Contact Names and Organization Name accordingly.

Type



The image shows a screenshot of a web application's dropdown menu. The menu is open, showing a list of debtor types. The current selection is "an Individual". The list includes: "an Individual", "a Florida Corporation", "a Foreign Corporation", "a General Partnership", "a Limited Partnership", "a National Banking Association", "a Non-Profit Corporation", "a Professional Association", "a Sole Proprietorship", "a State Banking Association", "an Individual", and "a Corporation". The "an Individual" option is highlighted in blue.

- Contact/Address Fields: Fill in the appropriate fields, to include first name / middle name / last name (for individuals), address, phone number(s) and email address(es).
- Add any necessary hold codes to the opponent as needed. For additional details regarding Hold Codes, view our [Hold Codes Help Document](#).
Note: Hold Codes allow you to tag the opponent with for more information, such as Case Settled or opponent in Jail, which are also displayed on the Main > Case File.
- SAVE

Note: It is required to save before navigating to the next tab and recommended to save your data often while adjusting additional tabs.

Adding an Opponent / Debtor

Other Details Tab

Location: Case File > Opponents > [Opponent Name] > Other Details

Screen Features: SSN/EIN, Birth Date, Gender, Marital Status, Military/Guarantor, Credit Score, Opposing Attorney, Driver's License #, D/L Expiration Date, Spouse Name / Relationship, Aliases.

Other Addresses Tab

Location: Case File > Opponents > [Opponent Name] > Other Addresses

Screen Features: Physical address (if different from Opponent's mailing address), Alternate Addresses, and Bad Phone Numbers, Email Addresses, and Mailing Addresses. Bad Addresses come in handy when mail is returned during collection and litigation tactics, and is an essential tool for skip tracing. For additional details, please visit our [Editing Bad Phone Numbers and Addresses Help Document](#).

Financials Tab

Location: Case File > Opponents > [Opponent Name] > Financials

Screen Features: Payment Arrangement setup and arrangement Calculator, along with a Financial Calculator to track income, expenses, and assets. For additional details, view our [Payment Arrangements Help Document](#).

User Defined Fields

Location: Case File > Opponents > [Opponent Name] > User Defined Fields

Screen Features: User defined fields to add custom fields to various screens for use with general tracking of information, as well as in document generation and custom reporting. For additional details, view our [User Defined Fields Help Document](#).

More

Location: Case File > Opponents > [Opponent Name] > More

The additional debtor screens located under the 'More' tab offer details and settings for things such as Litigation, Bankruptcy, Insurance, and Garnishments, which are customizable based on the Case Type and can be configured under the Administration area. For more details, view our [Additional Opponent/Debtor Screens Help Document](#).

Questions?

<https://casemasterpro.com/software-support/>

support@casemasterpro.com

(386) 675-0177