

Automations

Overview

This document details how to add automations in CMPOnline. Automations allow you to add or remove notes, reviews, and activity when an action is performed. For help setting up automations, please contact a CMPOnline representative for more information.

Adding an Automation

- Navigate to Administration > Setup > Company > (Automations).
- Click “Add New”.

Limiting Factors

Limiting factors allow you to specify when you would like an automation to occur. For example, if we set the Case Type field under limiting factors to Debt Collection, the action we choose below will only occur on Debt Collection case files.

- Select a Case Type limiting factor if needed.
- Select a Branch limiting factor if needed.

Triggering Action

Triggering Action refers to the action that will cause the note, review, or activity we choose below to be added or removed. For example, if we would like a review to be added every time we image an email, we would select Add Image as the triggering action.

- Select the triggering action. (Also select the corresponding follow-up field that appears once you choose your action.)

Automation Action

Automation Action refers to the action you would like to occur once the triggering action is performed. In our email example from above, the review that would be added to the case file once the image is added would be the automation action.

- Select the Automation Action. (Also select the corresponding follow-up field that appears once you choose your action.)
- Review all information above for accuracy and click Save.

Questions?

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