Assigning Bar Numbers

Overview

In this document, we'll be looking at adding bar numbers to attorneys in CMPOnline. There are two scenarios we will review in this document, assigning a single bar number to an attorney and assigning multiple bar numbers to an attorney by State.

Assigning One Bar Number

- Navigate to Administration > Security > Users and double click on the attorney you would like to configure.
- Scroll down to the bottom of the page and click "(view bar numbers)".
- Leave the State dropdown blank and enter the attorneys bar number in the Bar Number field.
- Click "Set", then save the user settings by clicking "Save".

Assigning Multiple Bar Numbers

- Navigate to Administration > Security > Users and double click on the attorney who you would like to configure.
- Scroll down to the bottom of the page and click "(view bar numbers)".
- Select the state for the first bar number and enter the attorneys bar number in the Bar Number field.
- Repeat the previous step for all bar numbers by clicking "(add)" to add each new bar number for the corresponding state.
- Once completed, click "Set", then save the user settings by clicking "Save".

Merging Bar Numbers in Documents

Once you have set the attorneys bar numbers using the steps above, we can merge their bar number into any necessary documents in CMPOnline.

- Ensure in the case file, that the attorney we configured is set as the Resp. Attorney.
- In the case that the attorney has multiple bar numbers, ensure a venue county is selected on the litigation screen, as this is what determines which bar number to use according to the venue county's state.

Assigning Bar Numbers

- Navigate to Administration > Setup > Document Templates and edit the template you would like to add the bar number merge field to.
  Note: If you need more information about Document Generation and creating Templates, please visit our [Document Generation Basics help file](#).
- Search for "AttorneyBarNumber" in the Merge Field search bar and insert it into your template where you wish.
- You can now test this template and your attorney bar number will be generated correctly within.

Questions?

support@casemasterpro.com
(386) 675-0177