



## CMPOnline Basic Document Generation

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This document details the procedure to generate documents in CMPOnline.

### Creating a Document Template

- Start by navigating, using the side menu, to Administration > Setup > Document Templates.
- From this screen, you can create folders to store templates, upload existing templates, modify existing templates, or create new templates.
- To create a folder:
  - Click the Create Folder icon at the top of the screen. (Pictured Right) 
  - Enter the name of the folder and hit enter on the keyboard to save.
  - From here, right clicking on the folder will allow you to:
    - Rename
    - Move
    - Copy
    - Delete
    - Refresh
- Once a folder is selected, the document template can be created.
- To create a template:
  - Click on “Create New DOCX” or “Create New XLSX”
    - The layout of both types of documents are similar, with the CMP Merge Fields located on the left and the document template on the right.
  - Merge Fields can now be added by either of two ways:
    - Double Click
    - Drag and Drop
  - Merge Fields can also be searched for using the search bar, located at the top of the Merge Field list.
- After you have completed your document template, you can save by:
  - Selecting File at the top of the document template.
  - Clicking Save As
  - Giving the template a descriptive name.
- The template is now saved, you can view or edit it again by double clicking the template.
  - Note: If you cannot see your template after saving, try refreshing the screen by clicking the green Refresh button. (Pictured Right) 

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### Document Categories

Document categories are similar to template folders, as document packages are filed into these for easier navigation when generating documents.

- To access document categories, navigate to Administration > Lookups > Documents > Document Categories.
- To create a new category:
  - Click Add New
  - Enter the Description
  - Click Save
- You can also edit or delete categories by selecting them and clicking the corresponding button on the bottom of the screen.

### Document Packages

Document Packages are made up of one or more document components or templates.

- To access document packages, navigate to Administration > Lookups > Document > Document Packages
- To create a new package:
  - Click Add New, at the bottom of the screen.
  - Complete the required fields:
    - Description
    - Type
    - Category
    - Optional Fields Include:
      - Billing Code
      - Add to Checks / Type
      - Add to Checks / Code
      - Image Description
  - Click Save, at the bottom of the screen.
- Once saved, you will be redirected to the Document Packages main screen.
- To edit the document package, you can either double click the package name or select the name and click Edit at the bottom of the screen.

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- Once editing the package, you can:
  - Add New Components
    - Under Components, click Add New.
    - Browse for the desired template you wish to add.
    - Click Save.
      - Other options such as conditions for document components are covered in the Advanced Document Generation guide.
  - Add New Reviews
    - Select the review code.
    - Select whether you wish to add or remove.
    - Click Save.

### **Generating Documents**

**You need to "Always Allow Popups" from this domain for document generation to work correctly.**

- Navigate to Case File > Documents.
- If you are only testing the documents, ensure that "Auto-Verify" is not checked in the top left of the window.
  - If Auto-Verify is checked, documents will automatically be added to the notes along with when it was generated and reviews that were added or removed.
- Select the document package you wish to generate.
- Select the Account and Opponent
  - If left blank, the first account and first opponent will automatically be selected.
- Click Generate Document
- Once the document is generated, you can:
  - Edit
  - Print
  - Save
  - Send to Imaging

**For more information about generating documents in CMPOnline, view our [YouTube page](#) or our [Advanced Document Generation document](#).**

### **Questions?**

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