Company Settings: Company Tab

Overview

In this document, we'll be looking at the Company Tab of Company Settings. These settings allow administrators to set firm wide settings in CMPOnline. This is the first of several tabs in the company settings. We will be reviewing the other tabs in later presentations.

Company Contact Details

These settings, found at the top of the page, allow administrators to set company contact information including:

- Company Name
- Phone #
- Fax #
- Toll Free #
- Address
- Federal Tax ID
- Company Website
- Company Email

This information is used in various areas throughout CMPOnline, including document merge fields, accounting, and more, so please ensure all information is accurate before saving.

Company Settings: Company Tab

Company Default Users

These settings, found in the center of the page, allow administrators to set default users for four areas of CMPOnline. Each are explained below:

- System Admin - Indicates which user should be responsible for all administrative tasks within CMPOnline.
- Accounting User - Indicates which user to assign Reviews to when Voiding or Misapplying a Payment (if the review code does not have an assigned user and the case file does not have a default user) and when closing a case file.
- Data Entry User - Indicates the default user to use on a case file when the file is imported through the Excel Placements area or via an EDI, and the default user is not assigned.
- Payment Agreement User - Indicates which user to assign Reviews to for Payment Arrangement reviews (if the review code does not have an assigned user and the case file does not have a default user).

Company Re-record Judgment Settings

Years to Re-record Judgment	Re-record Judgment Warning User	Re-record Judgment Warning # Days
10	Reeves, William Jesse	2

These settings, found toward the bottom of the page, allow administrators to set settings related to re-recording judgments, a feature found on the Administration > Batch Programs > Re-record Judgments page.

- Years to Re-record Judgment - This indicates how many years should pass before re-recording judgments is needed. This field plays a role in setting reviews on case files on the Re-record Judgments page mentioned above as well.
- Re-record Judgment Warning User - Indicates which user to warn during the login process if the specified number of days has passed since the last Re-record Judgments batch process was run.
- Re-record Judgment Warning # Days - Indicates the number of days to wait after the last Re-record Judgments batch process was run to notify the specified user that it should be run again.

Company Settings: Company Tab

Default Find Selection

This is the last setting on this screen, and allows administrators to set the default search category for users when using CMPOnline's Find Feature. By default, the Find Feature will select the opponent's last name as the search category. So keep in mind that this setting will change that default for all users company-wide. If a user prefers a different default for their Find Feature search category, they can easily change this in their user settings. For more information, please reach out to a CMP Representative.

Questions?

support@casemasterpro.com
(386) 675-0177