Creating a New Client (Part One of Two)

Overview

Creating a client in CMPOnline is one of the foundations of creating a case file. Creating a client is simple but needs to be done correctly in order for all of CMPOnline's features to be available and accurate. This document follows the YouTube video Creating a Client (Part 1 of 2) and details how to create a client in CMPOnline.

Note: Not all fields and features are detailed in this document. View Creating a Client (Part 2 of 2) for details on advanced options for creating and modifying clients.

Creating a New Client

- Navigate to Contacts > Clients.
- Click Add New.
- Enter a code in the **Code** field using the AAA999 format. *NOTE: This is how you will search and access clients, so use a naming structure that is relevant to your client's name using abbreviations and such.*
- Record basic information such as **Name**, **Address**, **Phone Numbers**, and **Email Addresses** into the corresponding fields.
- Click the Other/Notes tab at the top of the page.
- Record any applicable fields such as **Department**, **Web Page**, **SSN/ESIN**, and more into the following fields.
- Ensure the "Inactive?" box is not checked, found in the top right of the page.
- Click Save.

Setting Security

Setting security for new clients is not required, meaning if you wish to enable security for your new client you must configure it manually. The following steps detail how to do this.

- Navigate to Administration > Security > Client Security.
- Click Add New.
- Select the user you would like to add security to.
- Select Allow or Deny from the **Access If Unspecified** dropdown menu.

If Allow is Selected:
- Enter all client codes you would like to allow the user selected in step 3 access to.
- Click Save

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If Deny is Selected:

- Enter all client codes you would like to deny the user selected in step 3 access to.
- Click Save.

- Navigate to Administration > Setup > System Maintenance.
- Click Reload Company.

Questions?

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