

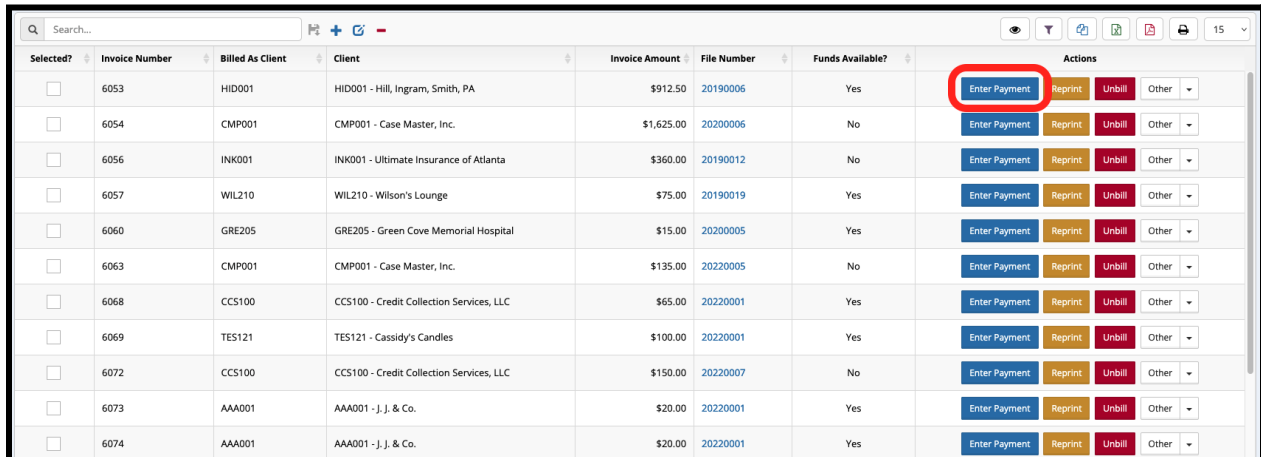
Entering Client Invoice Payments and Unpaying Bills

Overview

This document details how to enter invoice payments in CMPOnline as well as unpay bills. This document requires access to the CMPOnline accounting menus. If you do not have access to these menus, please contact a CMPOnline administrator or representative.

Entering Invoice Payments

- Navigate to Accounting > Billing > Open Bills.
- Search for the invoice you wish to pay by either searching within the search bar, scrolling, or using the column filter button.
- Once you have located the invoice you would like to pay, click “Enter Payment”.



Selected?	Invoice Number	Billed As Client	Client	Invoice Amount	File Number	Funds Available?	Actions
<input type="checkbox"/>	6053	HID001	HID001 - Hill, Ingram, Smith, PA	\$912.50	20190006	Yes	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6054	CMP001	CMP001 - Case Master, Inc.	\$1,625.00	20200006	No	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6056	INK001	INK001 - Ultimate Insurance of Atlanta	\$360.00	20190012	No	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6057	WIL210	WIL210 - Wilson's Lounge	\$75.00	20190019	Yes	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6060	GRE205	GRE205 - Green Cove Memorial Hospital	\$15.00	20200005	Yes	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6063	CMP001	CMP001 - Case Master, Inc.	\$135.00	20220005	No	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6068	CCS100	CCS100 - Credit Collection Services, LLC	\$65.00	20220001	Yes	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6069	TES121	TES121 - Cassidy's Candles	\$100.00	20220001	Yes	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6072	CCS100	CCS100 - Credit Collection Services, LLC	\$150.00	20220007	No	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6073	AAA001	AAA001 - J. J. & Co.	\$20.00	20220001	Yes	Enter Payment Reprint Unbill Other
<input type="checkbox"/>	6074	AAA001	AAA001 - J. J. & Co.	\$20.00	20220001	Yes	Enter Payment Reprint Unbill Other

- Ensure all automatically populated fields are correct, including Client, Invoice Number(s), Paid Date, and Amount Paid.
- Enter a Payment Reference if needed.
- If the client payment is to be deposited into a trust or operating account that is reconciled in CMPOnline, click the “Create Deposit?” box.
- When the 'Client Approved Payment from Retainer' is selected, Checks will automatically be entered to reimburse the firm for costs, fees, and taxes (if the 'Retainer Payment' transaction types / codes are properly configured on the Transaction Type setup).
- If you are not paying the invoice in full, use the line items below to update which items are to be paid in part or in full. (See below for more detail on partial payments.)
- Once done, ensure all is accurate and click “Accept”.

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Partial Payments


Once you have begun paying a bill, you may only want to enter a partial payment. CMPOnline offers two main ways to help you accomplish this.

First, you can enter the payment amounts for each line item separately, as seen below. This method should be used if you wish to pay specific line items before others.

Invoice Number	File Number	Local Counsel	Service Date	Service Code	Trans Type	Trans Code	Description	Billed	Paid
6053	20190006	Smith & Associates, P.A.	02/27/2019	COST	CC	MS	Court costs to reimburse operating account	\$100.00	\$100.00
6053	20190006	Smith & Associates, P.A.	02/19/2020	AFEE	AF	HR	Attorney's Fee	\$112.50	\$112.50
6053	20190006	Smith & Associates, P.A.	08/25/2020	AFEE	AF	HR	Attorney's Fee	\$20.00	\$20.00
6053	20190006	Smith & Associates, P.A.	01/14/2021	COST	CC	MS	Court costs to reimburse operating account	\$180.00	\$0.00
6053	20190006	Smith & Associates, P.A.	01/30/2021	CFEE	AF	CT	Contingency fees due.	\$500.00	\$0.00

As seen in the image, the top three line items are fully paid, while you can use the boxes to the right to specify the amount to pay for each of the bottom two items. As you do this, you will see the "Amount Paid" field automatically update.

Second, you can use the Auto Partial Pay feature, which allows you to enter the amount you wish to pay for an invoice, even if it is not the full amount, and CMPOnline will automatically disperse the amount between line items, starting at paying the oldest first.



Auto-Partial Pay

This process will pay the invoice for a partial amount (specified below) starting with the oldest item first (which is the same order that it appears on the bill).

Amount to Pay

Auto Pay Invoice(s)
Cancel

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Unpaying Bills

- Navigate to Accounting > Billing > Paid Bills.
- Search for the invoice you wish to unpay by either searching within the search bar, scrolling, or using the column filter button.
- Click “Unpay”.

Invoice Number	Invoice Date	Billed As Client	Client	Invoice Amount	Paid Date	Payment Reference	Actions
6090	04/19/2023	CCS100	CCS100 - Credit Collection Services, LLC	\$125.00	06/02/2023		Reprint Unpay
6089	04/04/2023	CCS100	CCS100 - Credit Collection Services, LLC	\$200.00	04/04/2023		Reprint Unpay
6088	04/04/2023	CCS100	CCS100 - Credit Collection Services, LLC	\$75.00	04/04/2023		Reprint Unpay
6087	02/21/2023	TES121	TES121 - Cassidy's Candles	\$1,250.00	02/21/2023		Reprint Unpay
6078	01/25/2023	AAA001	AAA001 - J.J. & Co.	\$5.00	01/25/2023		Reprint Unpay
6075	09/27/2022	CCS100	CCS100 - Credit Collection Services, LLC	\$750.00	09/27/2022		Reprint Unpay
6071	06/22/2022	CCS100	CCS100 - Credit Collection Services, LLC	\$50.00	06/22/2022		Reprint Unpay
6070	06/03/2022	CCS100	CCS100 - Credit Collection Services, LLC	\$0.00	06/03/2022		Reprint Unpay
6067	04/27/2022	GRE205	GRE205 - Green Cove Memorial Hospital	(\$37.50)	04/27/2022		Reprint Unpay
6066	04/26/2022	BUN001	BUN001 - Bunyan Axes and Things	\$500.00	04/26/2022		Reprint Unpay

- Ensure the Client and Invoice Number are correct.
- Select which of the line items you wish to unpay using the far left column.
- Click “Unpay”.

Billing at the Case File Level

Once any of these steps have been completed, it is recommended that you double check your actions at the case file level. To do this:

- Navigate to Case File > Financial > Billing.
- Select the screen you wish to review, Unbilled, Billed, Paid, or Voided.
- Use the grid provided to ensure all bills are located in the correct area within CMPOne. If you have any questions as to why a bill is not in the correct location, please contact a CMPOne representative.

Questions?

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