

Entering a Balance Adjustment



Overview

This guide explains how to create and manage balance adjustments within CMPOnline. Balance adjustments allow users to manually correct or update financial records for a case file. Each Transaction Type offers a different list of Transaction Codes, which are customizable based on your firm's needs.

How to Enter a Balance Adjustment

Navigate to **Case File > Financial > Transactions**.

- Click the **Balance Adjustment** button.
- Fill in the appropriate fields:
 - **Adjustment Date:** The date the adjustment is being recorded.
 - **Effective Date:** The date the financial change should take effect for accounting purposes.
 - **Adjustment Code:** Select the appropriate transaction code for this balance adjustment.
 - **Amount:** Enter the numerical value of the adjustment.
 - **Memo (Optional):** Add any internal notes or explanations regarding the adjustment.
 - **Opponent (Optional):** Link the adjustment to a specific opponent if applicable.
 - **Judgment Code:** If the adjustment relates to a specific legal judgment, select the corresponding code here.
- If you have more than one adjustment to record, click the **green plus (+)** button to add another line to the popup.
- Once all information is entered, click **Save** to post the adjustment(s) to the case file.

Add Adjustment interest calc x

WARNING: This file has a judgment or stipulation, so the adjustment code used should apply to the appropriate Judgment / Stipulation bucket.

Adjustment Date: 02/24/2026

Effective Date: 02/01/2026

Adjustment Code: Costs Adjustment

Amount: \$10.00

Memo: Test +

Opponent:

Jdg Code:

CANCEL SAVE

Balance Adjustment

Entering a Balance Adjustment



Interest Calc (Optional)

Optionally, there is a small “Interest Calc” link in the top right corner of the balance adjustment window used to calculate interest accrued on the amount entered, between two dates, at the rate specified. It assumes that there are no transactions that affect the balance between the dates provided, and that the entire amount can have interest accrued on it.

The screenshot shows a web application interface. At the top, there is a header 'Add Adjustment' on the left and a yellow button labeled 'interest calc' with a close icon on the right. Below the header, there is a 'WARNING' box with the text 'Judgm'. Below that, there are two 'Adjustm' sections. The first has a date '04/07/'. The second has a date field. Below these is an 'Oppone' section with a date field. A modal window titled 'Interest Calc' is open in the center. It contains a 'NOTE' box with the text: 'NOTE: This feature will calculate interest accrued on the amount entered, between 2 dates, at the rate specified. It assumes that there are no transactions that affect the balance between the dates provided, and that the entire amount can have interest accrued on it.' Below the note, there are four input fields: 'Interest Start Date' with the value '01/01/2026' and a calendar icon; 'Interest End Date' with the value '03/31/2026' and a calendar icon; 'Interest Rate' with the value '12.00%'; and 'Amount' with the value '\$349.52'. At the bottom of the modal, there are 'CANCEL' and 'CALC' buttons. At the bottom of the main window, there are 'CANCEL' and 'SAVE' buttons.

Questions?

<https://casemasterpro.com/software-support/support@casemasterpro.com> | (386) 675-0177

