

Entering and Printing Checks

Overview

This document details how to add and print checks in CMPOnline. This process can be completed in two different ways, so we encourage you to read through the entire document before beginning to add your own checks.

Adding Checks from the Case File

This is a useful way to add checks while you're on a specific case file. If adding multiple checks for different case files all at the same time, please skip to the "Adding Checks from the Accounting Area" step below.

- Navigate to Case File > Financial > Checks.
- Click "Add New".
- Select a Transaction Type.
Note: The transaction type determines which transaction codes will populate in the next step.
- Select a Transaction Code.
Note: The transaction code will often populate the payee details based on data inputted throughout your CMP case file.
- Enter the Check Amount.
- If it is not already populated or it needs to be changed, enter the checks payee details and type.
Note: If you selected a transaction code that should've populated the payee details automatically (i.e. Filing Fee or Sheriff Fee) and you do not see any payee details, your case file is then missing information needed to populate the payee information. Please contact a CMP Administrator for more details.
- Optionally, populate the remaining fields:
 - Debtor
 - Effective Date
 - Bank Account
 - Memo
 - E-Portal / Check Number
 - Combined Check
Note: When selected, all checks written to the same payee will be combined into one check and a Combined Check Report will generate along with the check detailing each transaction.
- Click Save.

If the check added to this case file is ready to print, jump to the "Printing Checks" step below.

Entering and Printing Checks

Adding Checks from the Accounting Area

This is a useful way to add multiple checks for different case files all at the same time. If adding a single check to just one case file, please go back up to the “Adding Checks from the Case File” step above.


- Navigate to Accounting > Checks > Enter Checks.
- Click “Add New”.
- Enter the checks corresponding File Number.
Note: If the file number isn't known, use the search icon to the right of the file number field.
- Select a Transaction Type.
Note: The transaction type determines which transaction codes will populate in the next step.
- Select a Transaction Code.
Note: The transaction code will often populate the payee details based on data inputted throughout your CMP case file.
- Enter the Check Amount.
- If it is not already populated or it needs to be changed, enter the checks payee details and type.
Note: If you selected a transaction code that should've populated the payee details automatically (i.e. Filing Fee or Sheriff Fee) and you do not see any payee details, your case file is then missing information needed to populate the payee information. Please contact a CMP Administrator for more details.
- Optionally, populate the remaining fields:
 - Debtor
 - Effective Date
 - Bank Account
 - Memo
 - E-Portal / Check Number
 - Combined Check
Note: When selected, all checks written to the same payee will be combined into one check and a Combined Check Report will generate along with the check detailing each transaction.
- Click Save.

If the multiple checks added are ready to print, jump to the “Printing Checks” step below.

Entering and Printing Checks

Printing Checks

- Navigate to Accounting > Checks > Print Checks.
- Select a Bank Account.
- Select the Check's Type.
- Enter the Check's Date.
- Enter the starting Check Number.
- Click "Select Checks".
 - In the grid, check which checks you wish to print, as seen below.
Optionally, you can use the search bar within this grid to filter for specific criteria, such as entered by user, client code, file number, etc.
 - Click "OK".



File	Client	Type	Code	Date Entered	Eff. Date	Entered By	Payee	Amount	E-Portal#	X	Selected By
20200002	GRE205	AF	CT	06/28/2022		gwilson	CMP and Associates, P.A.	\$15.00		<input checked="" type="checkbox"/>	jreeves
20200004	GRE205	AF	CT	06/28/2022		gwilson	CMP and Associates, P.A.	\$14.61		<input checked="" type="checkbox"/>	jreeves
20200007	CMP001	CC	FF	01/27/2023		cnall	Alachua Sheriff	\$50.00		<input type="checkbox"/>	

Showing 1 to 3 of 3 entries

Previous 1 Next

Select None Select All OK

- Click "Print".
- Review the pop-ups that appear, the first being the combined check report if applicable, the second being the checks themselves.
 - If correct, save and print the checks as needed, then return back to CMPOnline and click "Yes", I want to finalize the checks.
 - If incorrect and changes are needed or the checks do not print correctly on the check stock, exit the pop-ups, click "No", I do not want to finalize the checks, then repeat the Printing Checks process after making any necessary changes.

Questions?

support@casemasterpro.com
(386) 675-0177