



CMPOnline File Tags

Overview

CMPOnline allows users to assign **File Tags** to case files for quick and efficient organization. Once applied, File Tags can be used to locate case files through the CMPOnline **Find** feature and can also be incorporated into **Custom Reporting**.

Setting File Tags

- Navigate to the case file you wish to add a tag to.
- At the bottom of the main case file screen, locate the **File Tags** field.
- Click the field and enter your first tag (e.x. "Batch 1").
- Click Enter.
- Repeat steps above until all desired tags have been set.
- Delete any unnecessary tags by clicking the X next to the corresponding tag.
- Save the Case File by clicking the Save Case File button in the top left of the header.
- Repeat steps above as needed throughout other case files in CMPOnline.

Searching with File Tags

- Click the CMPOnline Find icon in the top right of the header.
- Ensure **Advanced?** is selected on the far right of this pop-up.
- Select File Tags from the **Find** dropdown menu.
- Enter the tag you wish to search for in the **Search Text** field.
- Click Enter.
- Navigate to any of the listed files by double clicking on the row below.

File Tags in Custom Reporting

Within Custom Reporting, you can use File Tags as you would any other available field in CMPOnline. For an in-depth look at how to use Custom Reporting, view our [Custom Reporting help document](#).

To run a report on File Tags, select the CaseFile fieldset and search for File Tags in the field section.

Questions?

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