

## User Defined Fields

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### Overview

This document details how to configure user defined fields in CMPOnline. User defined fields allow firms to add custom fields to various screens in CMPOnline. These fields can then be used for general tracking of information as well as document generation.

### Configuring User Defined Fields

- Navigate to Administration > Set Up > User Defined Fields.
- Select the area you wish to add your field to from the tabs at the top of the page. These areas include:
  - Case File
  - Account
  - Opponent
  - Contact
- There are several options for field types on each page. These options include:
  - Date Fields - Only dates are able to be entered.
  - Number Fields - Only numeric information may be entered.
  - Yes/No Fields - A checkbox to mark yes or no.
  - Text Fields - Any text may be entered.
- For the type of field you wish to create, enter a label in a corresponding UDF field.
- Click Save.

Once UDFs are set up, they will not only show up on their respective screens in CMPOnline, but they will also show up in the document template merge fields with the names given upon creation.

### Questions?

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