# CMPOnline Workflows

Workflows allow users to automate their case file process within CMPOnline, making adding and removing reviews simple and easy to understand. Workflows are comprised of two levels: Steps and Reviews.

*Steps in a workflow contain a set of reviews that are then added or removed once the step is complete.*

When creating a workflow, it is important to know three things. First, the section from the case file process you wish to automate. Second, the steps within that section. Lastly, the reviews (and codes associated with them) required to be added or removed within each step.

Within this documentation we will use the example of a Pre Suit-Workflow. Meaning, the section from the case file process would be "Pre Suit", the steps within the section would include Demand Letter, Call Debtor, etc., and the reviews within each step will be detailed below. Within the instructions below, all examples will be given a *blue* coloring.

## Creating a Workflow

- Start by navigating to Administration > Lookups > Case File > Workflows.
- Click "Add New"
    - o Enter the name of the Workflow.
        - ▪ Pre Suit
    - o Click "Save"
- Edit the newly created Workflow.
    - o Add Steps to your Workflow.
        - ▪ Demand Letter
        - ▪ Contact Debtor
        - ▪ No payment arrangement? Send file to paralegal for suit.
        - ▪ File Suit
    - o You can reorder these by dragging any step to any position.
    - o You can also delete any step by clicking the Trash icon.
    - o Click "Save"

- Again, edit the Workflow.
  - o Add reviews to each step by clicking "(reviews)" to the right of each step.
    - ▪ The following examples will relate to the reviews in our Demand Letter step.
  - o Select the review code you wish to add or remove.
    - ▪ SDL (Send Demand Letter)
  - o Select whether you want to add or remove the code.
    - ▪ Add
  - o Enter the desired Days Advanced (or leave blank).
  - o Select "Replace Review?" if you wish to replace an old review with a new one. (Must be the same Review Code.)
  - o Click "(add review)" if you wish to add or remove another review within this step.
  - o Click "Save"
- Repeat the procedure to add reviews for each step within the Workflow.

## Using a Workflow

- Start by navigating to Case File > Main > Settings.
  - o From the Workflow dropdown, select the newly created workflow.
  - o Save the case file.
- Now, click the new "Workflow" button in the bottom right of the main case file screen.
  - o To complete a step, simply click "complete step".
    - ▪ If you now navigate to Case File > Reviews, you will notice that the reviews within step one of your Workflow have been added or removed from the case files reviews.
  - o To undo a step, click "undo".
- Lastly, click "CLOSE" to close the Workflow pop-up and then always save the case file.

## Questions?

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