

CMTS (Case Management & Tracking System) Quick Tour Videos: Custom Fields

Speaker: Welcome to the CMTS demo. Let's take a quick look at the custom field section, where you can tailor CMTS to meet your organization's needs by adding customized fields to different forms and pages.

In the custom field section, you'll find a list of categories such as allegations, case initiation, documents, and others in the menu on the left side.

Once you select a section, simply click the “Add custom field” button to create a new field. You can choose from various field types, like check boxes, dropdowns, date pickers, and text boxes— depending on your needs.

Label your custom field to clearly define its purpose, and if needed, add help text to guide users. You can also control when and where the field appears by selecting specific case stages.

To further enhance data integrity, you can mark the field as required, ensuring that essential information is collected before users can proceed.

For person-related fields such as complainants or witnesses, you can enable unique search functions to easily track and match unique identifiers across cases, and tailor fields to fit individuals, companies, or confidential informants.

For streamlined data management, editing or deleting custom fields is simple. Just click “Edit”, make your changes, and save. If a field is no longer needed, you can disable it while keeping it stored for future reference.

Custom fields provide the flexibility to customize your data collection, ensuring your case management is as efficient as possible.

For more information or to schedule a demo, feel free to reach out at 855-636-5361 or team_cmts@securecasemanagement.com.

Thank you for choosing CMTS.