Importing Client-Matter Codes from an External Source into ADD4PC

Up to 3,000 unique Client-Matter Codes and up to 200 unique User Codes can be imported from an external file for the purpose of establishing Client and/or User validation tables.

The format of the imported file must meet the following criteria:

Import an ASCII file that includes the Client-Matter Code (as it is entered into the ADD-4 unit, include dashes where applicable) in quotes, the Client Name in quotes, the Unit Cost for copies, followed by 19 zeroes – all separated with commas. Each record is a separate line.

If you are entering fax pages into the ADD-4 unit, then the 16th position in each record should include the cost per fax page. Please refer to the sample file below.

Example:

"00999-00000","Smith vs Jones",0.1,0,0,0,0,0,0,0,0,0,0,0,0,0,0,1,0,0,0
"00999-00001","North vs South",0.2,0,0,0,0,0,0,0,0,0,0,0,0,0,0,2,0,0,0
"00999-00002","Husband vs Wife",0.33,0,0,0,0,0,0,0,0,0,0,0,0,0,0,2,0,0,0, 0
"01115-00000"," Texago",0.25,0,0,0,0,0,0,0,0,0,0,0,0,0,0,1,0,0, 0
"01240-00000","Mike v Deb",0.25,0,0,0,0,0,0,0,0,0,0,0,0,0,0,2,0,0, 0
"01288-00000","Germantown",0.25,0,0,0,0,0,0,0,0,0,0,0,0,0,0,1,0,0,0, 0
"01346-00000","Shelloil",0.25,0,0,0,0,0,0,0,0,0,0,0,0,0,0,.25,0,0, 0
"01347-00000","The Diamondtown Case",0.25,0,0,0,0,0,0,0,0,0,0,0,0,0,0,.30,0,0,0, 0
"01461-00000","Bob, NBob",0.25,0,0,0,0,0,0,0,0,0,0,0,0,0,0,1,0,0, 0
"01501-00000","Mike's Bar & Grill",0.25,0,0,0,0,0,0,0,0,0,0,0,0,0,0,1,0,0, 0

The specifics for the fields above are shown below:

"ClientMatter","ClientName",DefUnitCost,DefForFirst,DefThenCost,DefLimitCost,F1UnitCost,
F1ForFirst,F1ThenCost,F1LimitCost,F2UnitCost,F2ForFirst,F2ThenCost,F2LimitCost,F3UnitCost,
F3ForFirst,F3ThenCost,F3LimitCost, F4UnitCost, F4ForFirst,F4ThenCost,F4LimitCost

Once the ASCII file is created, import the file into the ADD4PC Program by selecting FILE|Import|Client-Matter List. Specify where the file is coming from and it's filename.

To check the success of your import – and to change the costs for copies and fax pages when applicable – click on the ACCOUNT button in the ADD4PC Program.

Prior to applying variable rates to select Client-Matter Codes for copies and fax pages, check with your TRS, Inc. Representative.

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