Forced Authorization Codes and Client Matter Code Deletions

This chapter provides information to delete CMC and FAC codes from the system using a custom file that contains the codes that you want to delete. You can edit a custom file where you previously inserted or updated authorization codes, or you can create a new CSV file where you manually enter the codes that you want to delete.

Code Setting Deletion Examples

If you plan to edit an existing CSV file, you must update the file, so only the lines that contain the codes that you want to delete remain in the file.

Example for CMC (Existing CSV File)

You obtain a file that contains the following information, and you decide to delete the client matter codes, 5550, 5551, and 5555:

- 5550,Phil Jones DDS

- 5551,Southwest Shades

- 5552,Happy Pharmaceuticals

- 5553,Weddings by Joyce

- 5554,Peterson Plumbing

- 5555,Acme Toys

- 5556,Chicago Paralegals

Before you delete the entries, the file must contain only the following entries:

- 5550,Phil Jones DDS

- 5551,Southwest Shades

- 5555,Acme Toys

Example for CMC (New CSV File)

If you create a new file to delete the codes, list only the codes, separated by lines, as shown in the following example:

5550

5551

5555

Example for FAC (Existing CSV File)

You obtain a file that contains the following information, and you decide to delete the authorization codes that are assigned to John, Dave, and Bill:

- 1233,Sandy Brown,30

- 1234,John Smith,20

- 1235,Dave Green,30

- 1236,John David,20

- 1237,Alex Anderson,30

- 1238,Bill Jones,20

- 1239,Jennifer Summers,20

Before you can delete the entries for John, Dave, and Bill, the file must contain only the following entries:

- 1234,John Smith,20

- 1235,Dave Green,30

- 1238,Bill Jones,20

Example for FAC (New File)

If you create a new file to delete the codes, list only the codes, separated by lines, as shown in the following example:

1234

1235

1238

Related Topics

Delete Forced Authorization Codes and Client Matter Codes

You can delete CMC and FAC records using a custom CSV file.

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Note Do not use the insert or export transaction files that are created with bat.xlt for the delete transaction. Instead, you must create a custom file with details of the CMC or FAC records that need to be deleted. Use only this file for the delete transaction. In this custom delete file, you do not need a header, and you can enter values for codes.

Before you begin

- Create a new CSV file for codes that you want to delete using one of the following tasks:

  - For CMC, see Example for CMC (New CSV File), on page 2.

  - For FAC, see Example for FAC (Existing CSV File), on page 2.

- On the server download the appropriate CSV files from the first node of the server. For more information, see Download File Off Server.

- In a text editor, open and edit the existing CSV file to delete the entries.

- Upload the modified CSV files to the first node of the server. For more information, see Upload File to Server.

Procedure

Step 1 In Administration, choose one of the following options, depending on whether you plan to delete client matter codes or forced authorization codes:

a) For CMC, choose **Bulk Administration** > **Client Matter Codes** > **Delete Client Matter Codes**

b) For FAC, choose **Bulk Administration** > **Forced Authorization Codes** > **Delete Forced Authorization Codes**

Step 2 Choose a custom file from the drop-down list and click **Find**.
The **Find and List Client Matter Codes** window or **Find and List Forced Authorization** window displays.

Step 3 In the **Job Information** area, enter the Job description.

Step 4 Choose a delete method. Do one of the following:

a) Click **Run Immediately** to delete CMC or FAC immediately.

b) Click **Run Later** to delete CMC or FAC at a later time.

Step 5 Click **Submit** to create a job for deleting FAC and CMC.

Use the Job Scheduler option in the **Bulk Administration** main menu to schedule and/or activate this job.

Caution Make sure that you browse the entire list of the displayed results before submitting the job for deletion.

Related Topics

Topics Related to Forced Authorization Codes and Client Matter Codes