



## What's New at Amicus?

### Introducing Amicus End-User Certification Program

Gavel & Gown Software is pleased to introduce certification programs for end-users. These programs are designed specifically for Amicus Attorney and Amicus Accounting customers...

[Read more](#)

### FAQ - Answers To Some Common Technical Questions

#### I keep getting a To Do every day titled Review Status of File. What is this?

Amicus Attorney is designed to help you stay on top of your files. One such feature is the No Time Entries warning. A warning can be set to notify the Responsible Lawyer on a file if no Time Entries have been created on a...

[Read more](#)

## Events and More

*Find Out Where Our Product Will Be Showcased In The Next Few Months*

### ABA TECHSHOW 2009

April 2-3, 2009

Chicago, IL

Get Your [Free Expo Pass](#) (PDF)

### ALA Annual Educational Conference and Expo

May 18-21, 2009

New Orleans, LA

### Indiana Solo and Small Firm Conference

June 4-6, 2009

Chicago, IL

### Connecticut State Bar Annual Meeting

June 8, 2009

Hartford, CT

[See Complete Event Listings](#)

## Amicus Showcase

### PREMIUM EDITION

#### Conflict Check

Amicus can assist you in checking for conflicts of interest among the people in your database.

Build a custom conflict check by picking what...

[Read more](#)

### SMALL FIRM EDITION

#### Conflict Check

Amicus can assist you in checking for conflicts of interest among the contacts in your database.

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### AMICUS ACCOUNTING

#### Client Listing Reports

The Client Listing report is the basic report to print if you require a list of your client files with their overall balances, and information such as...

[Read more](#)

### AMICUS MOBILE

#### Files

Amicus Mobile lets you view your entire file index and files wherever you are from your mobile...

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## What's New at Amicus?

[newsletter index](#)

### Introducing Amicus End-User Certification Program

Gavel & Gown Software is pleased to introduce certification programs for end-users. These programs are designed specifically for Amicus Attorney and Amicus Accounting customers.

Courses will take place in the new Amicus Training Center in our Toronto office. This state of the art training facility is outfitted with the latest in technology to offer you a superior learning experience.

#### **Beginning this summer, we will be offering certification programs for end-users:**

- Amicus Attorney 2009 Small Firm Edition Certified User program
- Amicus Attorney 2009 Small Firm Edition Certified Administrator program
- Amicus Attorney 2009 Premium Edition Certified User program
- Amicus Attorney 2009 Premium Edition Certified Administrator program
- Amicus Accounting 2009 Certified User program

These hands on educational classes are limited to 10 participants ensuring you get maximum exposure to your product. Whether you are an Amicus user wanting to learn about the latest product version, a law firm staff member who has never had exposure to Amicus or just want to add the "Amicus Certified" designation to your resume, this is the program for you.

Please visit us online for more information on [Amicus Certified User Training](#).

This program is for end-users only. Those interested in our Amicus Certified Business Partner program should visit the [consultants section of our website](#).

*All training is conducted on the latest Amicus products (currently Amicus Attorney 2009 Small Firm Edition, Amicus Attorney 2009 Premium Edition and Amicus Accounting 2009)*

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## FAQ - Answers To Some Common Technical Questions

### "I keep getting a To Do every day titled Review Status of File. What is this?"

Amicus Attorney is designed to help you stay on top of your files. One such feature is the No Time Entries warning. A warning can be set to notify the Responsible Lawyer on a file if no Time Entries have been created on a specific file within an allotted amount of time. The warning appears in the Today's Practice Reminders section of the Dailies and a "Review Status" To Do is scheduled to remind them to check the file. This reminder message will reappear every day until a time entry is added to the file.

To set a warning for any file:

#### Amicus Attorney Premium Edition

1. Open the file
2. Select Admin > General
3. Select the No Time Entry checkbox
4. In the box to the right of the checkbox, type the number of days before warning

#### Amicus Attorney Small Firm Edition

1. Open the file
2. Select Administration > Responsible Lawyer
3. Select the Warn Responsible Lawyer if there has not been a Time Entry on this File checkbox
4. In the box below, type the number of days before warning

**NOTE:** *If this reminder is set on a file by any user and a time entry has not been created on the file within the set time, the message will reappear to the Responsible Lawyer each day until a time entry is created on the file.*

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## Amicus Showcase

### PREMIUM EDITION

#### Conflict Check

Amicus can assist you in checking for conflicts of interest among the people in your database. Build a custom conflict check by picking what elements of Amicus should be searched, including custom fields, time entries, notes and more and save or print results in an easy to read report.

To search for conflicts of interest:

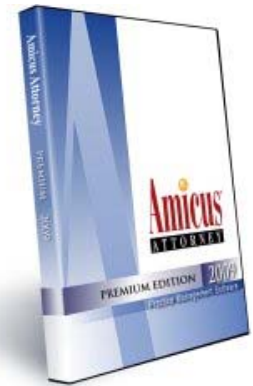
1. Open the people or file Index and choose Check Conflicts on the actions menu.
2. Select the type of search:

#### Basic Search

1. Enter the name you want to check for possible conflict.
2. Click Check Now to search full name, company name, street address and notes fields in contact records and shows related contacts.

#### Advanced Search

1. Enter one or more names you want to check for possible conflict separated by semicolons.
  - If you are not sure of the exact name, try typing only part of the name to display as many potential matches as possible for more complete results. For example, a search on Donald will find Donald, McDonald, MacDonald, and Donaldson.
  - If you enter a search phrase, such as John Smith, the results might be more restricted than you desire. This search will find John Smith and John Smithson but would miss Johnny Smith and John B. Smith.
  - Searches are not case sensitive. SMITH, Smith, and smith are the same.
2. Select the fields you want searched.
  - Contact fields- search against both contacts and firm members.
  - Contact Custom Text Fields- searches custom fields of the following types: text, memo, path/URL, email, SSN, and SIN. Amicus Administrators should note that, to ensure inclusive results, fields are searched even if their "Include in searches" attribute is set to false.
  - Show Contact Relationships- lists the people who are related to each match found by a contact search.
  - Note records- searches the text of all unassociated and associated notes.



[Conflict Check - Basic Search](#)



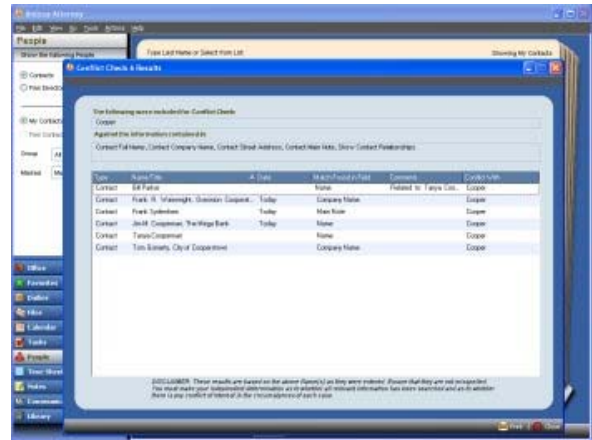
[Conflict Check - Advanced Search](#)

- Event Title and Notes- searches the event title and main note fields. Associated note records are not included.
3. Click Check Now to search selected fields in contacts, files, time entries, events, documents, communications, and/or note records and optionally shows related people.

### Conflict Check Results

1. The conflict check results dialog lists all records that match on any of the names searched for. The following information is shown for each record:

- **Type** of matching record (contact, file, note, to do, etc.).
- **Name/Title** of matching record. For documents and time entries, the assigned short file name is shown if there is a file association. If a document is assigned to a contact only, the contact's name is shown instead. For records to which you do not have viewing rights, NOT IN YOUR LIST or RESTRICTED is shown, as appropriate.
- **Date** of matching record (contact's last contacted date, file opened date, creation date, etc.).
- **Match Found In** field(s).
- **Comments-** Names of related people:
  - › See: Name(s)- If you are not assigned to the person matched on, the Firm Member(s) assigned to that record are listed here so that you may consult them for further information (for files, the responsible lawyer is shown).
  - › Name is Related- If the person is shown in the results because they have a non-reciprocal (i.e. one-way) relationship with a person who matches your search, the name of that matching person is shown here.
  - › Related to: Name- If the person is shown in the results because they have a reciprocal (i.e. two-way) relationship with a person who matches your search, the name of that matching person is shown here.
- **Conflict With-** The search name for which this match was found.



Conflict Check Results

2. To see more information about a record, double-click the row in the results list. The record's details dialog will open.
3. To generate a conflict check report, click Print from the results page. The report opens in your default word processor (or Notepad).
4. Save and/or print the report. You can also associate the report to an Amicus file.

*You are fully responsible for checking and determining possible conflicts of interest in every case. While Amicus Attorney provides a useful tool, it should not be relied on to make a final conflict determination. Only your professional judgment can do that, using all the information within the firm's possession, and allowing for errors and omissions which people may have made in recording that information.*

For more information on Amicus Attorney 2009 Premium Edition visit [www.amicusattorney.com](http://www.amicusattorney.com).

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## Amicus Showcase

### SMALL FIRM EDITION

#### Conflict Check

Amicus can assist you in checking for conflicts of interest among the contacts in your database. Build a custom conflict check by picking what elements of Amicus should be searched, including time entries, notes, documents and more and save or print results in an easy to read report.

To search for conflicts of interest:

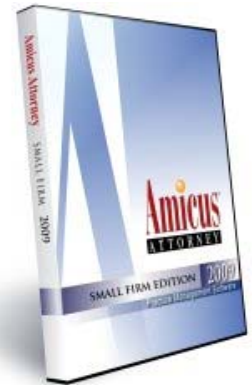
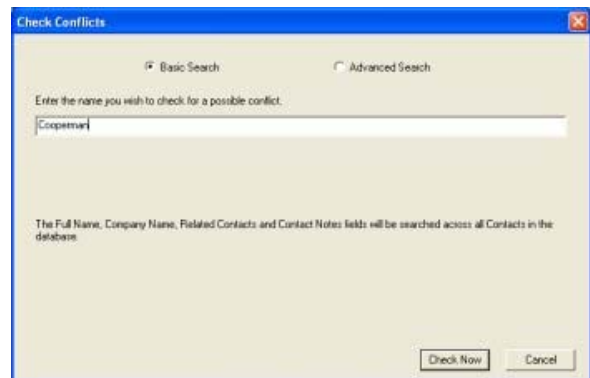
1. Open the contacts or file index and select Check Conflicts from the Contacts or Files menu.
2. Select the type of search. You can choose to do a basic or advanced search.

#### Basic Search

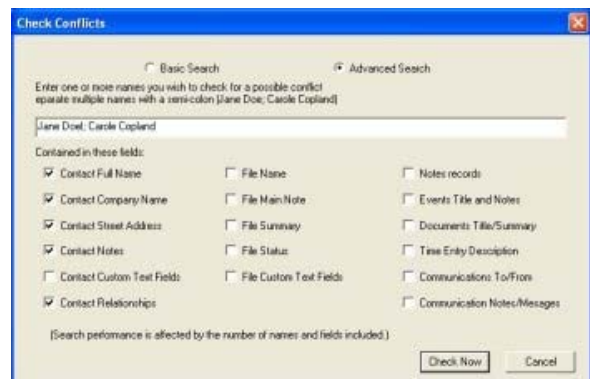
1. Enter the name you want to check for possible conflict.
2. Click Check Now to search full name, company name, street address and notes fields in contact records and shows related contacts.

#### Advanced Search

1. Enter one or more names you want to check for possible conflict separated by semicolons.
  - If you are not sure of the exact name, try typing only part of the name to display as many potential matches as possible for more complete results. For example, a search on Donald will find Donald, McDonald, MacDonald, and Donaldson.
  - If you enter a search phrase, such as John Smith, the results might be more restricted than you desire. This search will find John Smith and John Smithson but would miss Johnny Smith and John B. Smith.
  - Searches are not case sensitive. SMITH, Smith, and smith are the same.
2. Select the fields you want searched.
  - Show Contact Relationships- lists the contacts that are related to each match found by a contact search.
  - Note records- searches the text of all unassociated and associated notes.
3. Click Check Now to search selected fields in contacts, files, time entries, events, documents, communications, and/or note records and optionally shows related contacts.

[Conflict Check - Basic Search](#)



[Conflict Check - Advanced Search](#)

## Conflict Check Results

1. The conflict check results dialog lists all records that match on any of the names searched for. The following information is shown for each record:

- **Type** of matching record (contact, file, note, to do, etc.).
  - **Name/Title** of matching record. For documents and time entries, the assigned short file name is shown if there is a file association. For contacts to which you are not assigned, the contact's name is shown. For other types of records to which you are not assigned, only NOT IN YOUR LIST is displayed.
  - **Date** of matching record (contact's last contacted date, file opened date, creation date, etc.).
  - **Match Found In** field(s).
  - **Comments**- Names of related contacts:
    - › See: Name(s)- If you are not assigned to the contact matched on, the Team Member(s) assigned to that record are listed here so that you may consult them for further information.
    - › Name is Related- If the contact is shown in the results because they have a non-reciprocal (i.e. one-way) relationship with a contact who matches your search, the name of that matching contact is shown here.
    - › Related to: Name- If the contact is shown in the results because they have a reciprocal (i.e. two-way) relationship with a contact who matches your search, the name of that matching contact is shown here.
  - **Conflict With**- The search name for which this match was found.
2. To see more information about a record, double-click the row in the results list. The record's details dialog will open.
  3. To generate a conflict check report, click Print on the results page. The report opens in your default word processor (or Notepad).
  4. Save and/or print the report. You can also associate the report to an Amicus file.

Type	Name/Title	Date	Match Found In Field	Comments	Conflict With
Phone Call	To: Janet Boly	Dec 24/09	Communication To/From		Et
Phone Message	From: Janet Boly	Dec 24/09	Communication To/From		Et
Email	Following Update	Dec 24/09	Communication To/From		Et
Phone Call	From: Janet Boly	Nov 14/09	Communication To/From		Et
File	Bolyre Filing	Nov 20/09 (Edward)	File Name: File Summary		Et
Contact	Ms. Janet Boly	Nov 17/09 (Last Conct)	Contact Full Name: Contact Co.		Et

[Conflict Check Report](#)

*You are fully responsible for checking and determining possible conflicts of interest in every case. While Amicus Attorney provides a useful tool, it should not be relied on to make a final conflict determination. Only your professional judgment can do that, using all the information within the firm's possession, and allowing for errors and omissions which people may have made in recording that information.*

For more information on Amicus Attorney 2009 Small Firm Edition visit [www.amicusattorney.com](http://www.amicusattorney.com).

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## Amicus Showcase

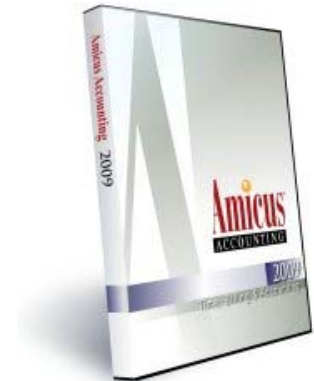
### AMICUS ACCOUNTING

#### Client Listing Reports

The Client Listing report is the basic report to print if you require a list of your client files with their overall balances, and information such as matter description, responsible lawyer, originating lawyer, file type, and billing cycle. Print this report as part of your month-end and year-end procedures.

To run the Client Listing Report:

1. Go to Reports > Client Reports > Client Listing (this report is also available from Account Inquiry, by clicking Print/View All).
2. Enter the report date, click the calendar icon to select a date from the calendar or press Enter to use the current system date.
3. Enter the date range or click the calendar icon to select dates from the calendar for transactions to include on the report.
4. Choose how you want to print the report- by responsible lawyer, by originating lawyer, or for the entire firm.




[ACCOUNTING FREE TRIAL](#)  
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- **Assigned lawyer:** The lawyer who actually did the work on the file. In Amicus Accounting, an assigned (individual) lawyer is where lawyer fees are posted or distributed to. When you post time using the New Time Entry function, you select the assigned lawyer, the lawyer who actually did the work on the file and whose time you are recording. When you distribute fees in the Billing, Firm Receipts, A/R Write-off, or Trust Transfer to A/R function, you can distribute fees to an assigned lawyer.
- **Responsible lawyer:** The lawyer who is in charge of the file. This is not necessarily the lawyer that brought the business to the firm or the lawyer doing the work on the file. When you add new client files you specify the responsible lawyer and, optionally, the originating lawyer in the Matter Details view of the Client Matter Details screen.
- **Originating lawyer:** The lawyer who brought the business to the firm. This might not be the same lawyer who does the work on the file. Not all firms track originating lawyers

**NOTE:** If you are printing the report by responsible or originating lawyer, select the lawyers to include. You can print the report for a single lawyer, for a range of lawyers, or for all lawyers. A separate report will print for each lawyer.

5. Select the range of file types to include. If you do not make a selection all file types will be included.
6. Select Alpha to sort the report by client name or select Numeric to sort by File ID
7. Click Add to Report Runner if you would like to add the report to the Automatic Report Runner, enabling you to print the report as part of a report group. The Automatic Report Runner is used to group reports so that you can print them in batches. This is useful when you have a large number of reports to be printed, for example, at month end.
8. Click View to display the report on your screen or click Print to send it to your printer.
9. The Client Listing report contains:
  - **Date of Report-** Date entered in the report screen.
  - **Include Transactions-** Only transactions posted within this date range will be included.



The screenshot shows the 'Client Listing' configuration window. It includes the following fields and options:

- Date of Report:** 03/27/2009
- Include Transactions from:** 01/01/2009 to 03/27/2009
- Report by:**
  - Responsible Lawyer Range
  - Originating Lawyer Range
  - Firm
- Lawyer Range:** 1 to 99
- File Type Range:** 80 to SUS
- Sort by:**
  - Alpha
  - Numeric

Buttons at the bottom: Add to Report Runner, View, Print, Close.

[Reports > Client Listing](#)

- **Sort by-** Alphabetic reports are sorted in client name order. Numeric reports are sorted in File ID (Client Matter ID) order.
- **Report by-** The report can be printed by responsible lawyer, by originating lawyer, or for the entire firm.
- **For Lawyer(s)-** Lawyer number range, if you selected to print by responsible or originating lawyer.
- **File Type range-** You can print the report for a specific file type or for a range of file types.
- **Client No.-** One line of information is displayed per client.
- **Matter Description-** Matter description on the client file. It will appear on the second line under the client name.
- **Resp. Law.-** Responsible lawyer number assigned to the client file.
- **Orig. Law.-** Originating lawyer number assigned to the client file.
- **Law Init.-** Initials of the responsible lawyer.
- **File Type-** File type assigned to the client file.
- **Bill. Cyc.-** Billing cycle assigned to the client file.
- **WIP Hours/Fees/Exp.-** Total WIP hours, fees and expenses posted to the client file during the date range selected.
- **Accounts Receivable Fees/Exp.-** Total accounts receivable fees and expenses posted to the client file during the date range selected.
- **Retainer-** General retainer balance.
- **Trust-** Total funds in trust on the client file.

The screenshot shows a 'Client Listing' report with the following data:

Client No.	Client Name	Case No.	Case Name	File No.	Billing Cycle	Status	WIP	Fees	Exp.	Trust	Balance
1000	John J. Smith										
1001	John J. Smith	0	0	0	0	0	0	0	0	0	0
1002	John J. Smith	0	0	0	0	0	0	0	0	0	0
1003	John J. Smith	0	0	0	0	0	0	0	0	0	0
1004	John J. Smith	0	0	0	0	0	0	0	0	0	0
1005	John J. Smith	0	0	0	0	0	0	0	0	0	0
1006	John J. Smith	0	0	0	0	0	0	0	0	0	0
1007	John J. Smith	0	0	0	0	0	0	0	0	0	0
1008	John J. Smith	0	0	0	0	0	0	0	0	0	0
1009	John J. Smith	0	0	0	0	0	0	0	0	0	0
1010	John J. Smith	0	0	0	0	0	0	0	0	0	0

[Reports > Client Listing > Results](#)

### Tips

- You cannot backdate client unbilled time and expense amounts. This means that if you have posted bills or closed files, WIP totals on client reports will be inaccurate if you print as of a previous date.
- Closed files are not included on this report, even if you print the report as of a date prior to when the file was closed.
- If the WIP, A/R or trust totals for a client file are incorrect, check the dates used to post the transactions. Also, check the Include Transactions From dates on the report. Only transactions posted within the date range selected will display on the report.

[Amicus Accounting 2009 Overview](#)

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