



## Special Announcements

### Your Practice, Your Way

By Neil Squillante, TechnoLawyer Newswire

Having information at your fingertips won't do you much good if there's too much of it to thumb through. Nowadays, you don't just need access to information. You need intelligent access. This need is particularly acute...

[Read more](#)

## FAQ - Answers To Some Common Technical Questions

### Do I have to enable the Amicus Attorney Email Integration to send emails from Amicus Attorney?

Whether or not you have the Amicus email integration enabled you can still send emails from Amicus Attorney...

[Read more](#)

## Events and More

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

### Massachusetts State Bar Legal Technology Expo

March 20, 2009  
Framingham, MA

### Louisiana State Bar Solo & Small Firm Conference

March 26-27, 2009  
New Orleans, LA

### ABA TECHSHOW 2009

April 2-3, 2009  
Chicago, IL  
Get Your [Free Expo Pass \(PDF\)](#)

[See Complete Event Listings](#)

## Amicus Showcase

### PREMIUM EDITION

#### File Intake Forms

File Intake Forms streamline the file opening process and help ensure that all necessary information is captured with minimal navigation...

[Read more](#)

### SMALL FIRM EDITION

#### File Intake Forms

File Intake Forms streamline the file opening process and help ensure that all necessary information is captured with minimal navigation...

[Read more](#)

### AMICUS ACCOUNTING

#### Reconciling Bank Accounts

Reconciling bank accounts involves clearing checks and deposits that have cleared the bank...

[Read more](#)

### AMICUS MOBILE

#### Time Entries

When you've finished recording your call notes for incoming or outgoing phone calls, Amicus Mobile will automatically offer to create a time entry so...

[Read more](#)

[Send to a Friend - Click Here](#)

[Unsubscribe - Click Here](#)

[Printable PDF](#)

You have received this eNewsletter as you are a current Amicus Attorney customer or have previously requested information or this newsletter from our company.

Amicus and Amicus Attorney are registered trademarks and Amicus Accounting and Amicus Mobile are trademarks of Gavel & Gown Software Inc. © 2009.

[www.amicusattorney.com](http://www.amicusattorney.com)

## What's New at Amicus?

[newsletter index](#)

### Your Practice, Your Way

By Neil Squillante, *TechnoLawyer Newswire*

Having information at your fingertips won't do you much good if there's too much of it to thumb through. Nowadays, you don't just need access to information. You need intelligent access. This need is particularly acute within the context of practice management software because that's what you use to run your firm. Fortunately, help is at hand... [READ MORE](#)

#### ON THE NEW AMICUS DASHBOARD:

*"As intimated above, sometimes you need to see the forest and sometimes you need to see the trees. The new Dashboard in Amicus Attorney 2009 offers the best of both worlds."*



Amicus Attorney 2009 Premium Edition



Amicus Attorney 2009 Small Firm Edition

#### ON THE NEW FILE INTAKE FORM:

*"You can design your own templates and designate mandatory fields or use the included Client Matter Intake Form."*



Amicus Attorney 2009 Premium Edition



Amicus Attorney 2009 Small Firm Edition

#### ON THE ENHANCED CONFLICT CHECK:

*"You can designate which areas of Amicus Attorney 2009 to search, including custom fields, notes, and even time entries."*



Amicus Attorney 2009 Premium Edition



Amicus Attorney 2009 Small Firm Edition

For more information on Amicus products please visit [www.amicusattorney.com](http://www.amicusattorney.com).

**Send to a Friend - Click Here**

**Unsubscribe - Click Here**

**Printable PDF**

You have received this eNewsletter as you are a current Amicus Attorney customer or have previously requested information or this newsletter from our company.

Amicus and Amicus Attorney are registered trademarks and Amicus Accounting and Amicus Mobile are trademarks of Gavel & Gown Software Inc. © 2009.  
[www.amicusattorney.com](http://www.amicusattorney.com)



[newsletter index](#)

## FAQ - *Answers To Some Common Technical Questions*

### "Do I have to enable the Amicus Attorney Email Integration to send emails from Amicus Attorney?"

Whether or not you have Amicus email integration enabled you can still send emails from Amicus Attorney. To do so, find the contact you wish to send an email to that has an email address on it. Simply click on the email address and Amicus launches your native email application with the email address already filled out.

If you require further functionality such as the ability to save and associate incoming and outgoing messages to client matters and contacts, then you will need to enable Amicus email integration which requires Microsoft Outlook.

**Send to a Friend - [Click Here](#)**

**Unsubscribe - [Click Here](#)**

**Printable PDF**

You have received this eNewsletter as you are a current Amicus Attorney customer or have previously requested information or this newsletter from our company.

Amicus and Amicus Attorney are registered trademarks and Amicus Accounting and Amicus Mobile are trademarks of Gavel & Gown Software Inc. © 2009.  
[www.amicusattorney.com](http://www.amicusattorney.com)

## Amicus Showcase

### PREMIUM EDITION

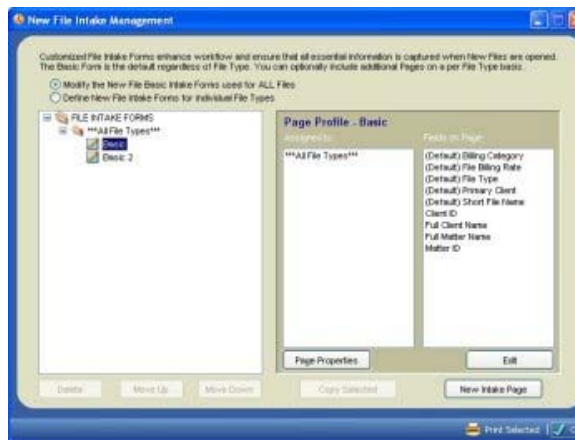
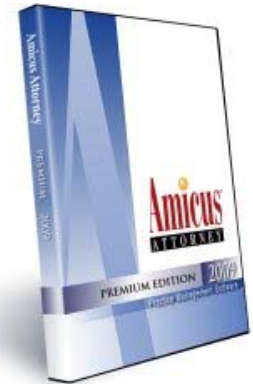
#### Creating File Intake Forms

File Intake Forms streamline the file opening process and help ensure that all necessary information is captured with minimal navigation. There are two types of Intake pages:

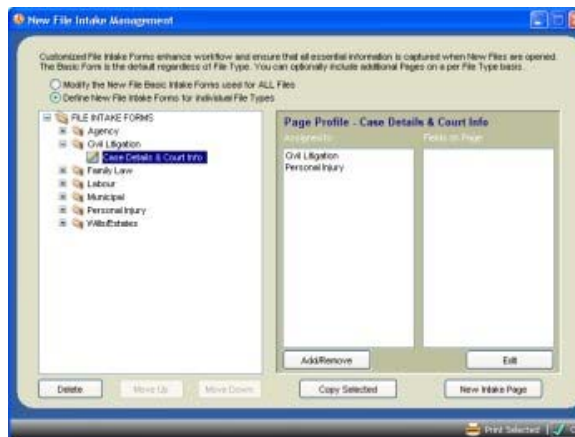
- ones that apply to all new files regardless of file type (Basic Pages).
- ones that are designated for use when the new file is a particular file type. This provides flexibility for including additional fields (including Custom Fields) that may be required by a specific file type.

To configure a File Intake Form, the administrator must:

1. Go to the Office module.
2. Select New File Intake Management on the navigation list.
3. You can add new pages, select an existing page to edit, resequence, copy, delete or add/remove file type assignments. To do so, choose which type of page you wish to create or edit:
  - For a Basic Page, select the Modify the New File BASIC Intake Form used for ALL Files option
  - For a File Type-Specific Page, select the Define New File Intake Pages for this individual File Type option and select the File Type from the drop-down list.
4. A navigation list of pages grouped by file type is shown at the left. Click on any page and the list of file types to which it is assigned and a list of its fields are shown at the right.
5. To add a new blank page click New Intake Page.



File Intake Management - Basic Pages



File Intake Management - File Type-Specific Pages



## Amicus Showcase

### SMALL FIRM EDITION

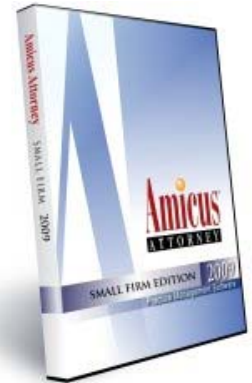
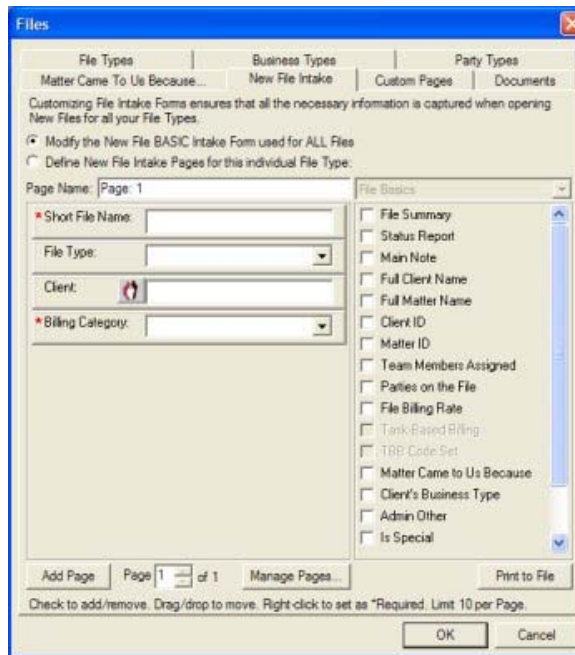
#### Creating File Intake Forms

File Intake Forms streamline the file opening process and help ensure that all necessary information is captured with minimal navigation. There are two types of Intake pages:

- ones that apply to all new files regardless of file type (Basic Pages).
- ones that are designated for use when the new file is a particular file type. This provides flexibility for including additional fields (including Custom Fields) that may be required by a specific file type.

To configure a File Intake Form, the administrator must:

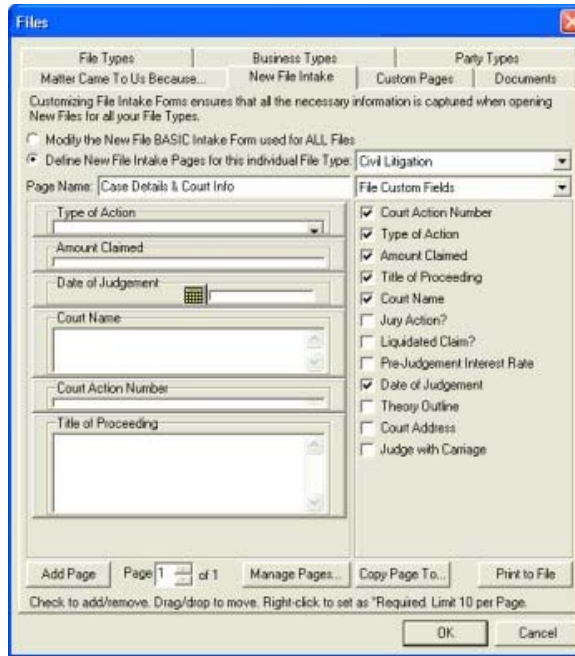
1. Go to the Amicus Administrator.
2. Click on Configure.
3. Select Files.
4. Click the New File Intake tab.
5. Choose which type of page you wish to add:
  - For a Basic Page, select the Modify the New File BASIC Intake Form used for ALL Files option.
  - For a File Type-Specific Page, select the Define New File Intake Pages for this individual File Type option and select the File Type from the drop-down list.
6. Edit the page name if you wish (to help identify pages during the design process).
7. To add new pages, click the Add Page button. To navigate among the pages, use the up and down arrow buttons to the right of the Page field (Page x of x).
8. To add fields to the current page, select the corresponding checkbox in the list of available fields at

Basic Pages

the right. If configuring a File Type-specific Page, use the drop-down list near the top to switch between File Basics list (core file fields) and File Custom Fields list (fields included on any of the custom pages configured for the current file type).

**NOTE:** The Client ID and Matter ID basic file fields will be disabled to users of the New File Intake Form if your accounting link is set to use automatic numbering. The Exclude from Accounting Link field is available if supported by your accounting link. Task-Based Billing and TBB Code Set fields are available if your link is set to use task-based billing.



[File Type-Specific Pages](#)

9. To rearrange fields, drag them up or down on the form as desired. To change the height of a text field (e.g. File Summary) or some other fields (e.g. Team Members Assigned), drag the bottom edge of the field.
10. To designate a field as required on the page so a user must enter a value before proceeding, right-click on the field and choose Is Required. The required fields will be displayed in red and marked with an asterisk. Two default core fields, Short File Name and Billing Category, are automatically set to be required.
11. To delete a field from the current set of pages, clear the corresponding checkbox in the field list at the right, or simply drag the field from the design area back to the list at the right. Removing fields from a New File Intake Form does not affect the availability of those fields in the File Details itself. The Short File Name, Client, File Type, and Billing Category fields cannot be removed from the first Basic Page.
12. To rearrange the sequence of Pages in the current set, or to remove a Page, click Manage Pages. In the dialog that appears, make the desired changes.
13. Click OK when you are finished.

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

**Send to a Friend - Click Here**

**Unsubscribe - Click Here**

**Printable PDF**

You have received this eNewsletter as you are a current Amicus Attorney customer or have previously requested information or this newsletter from our company.

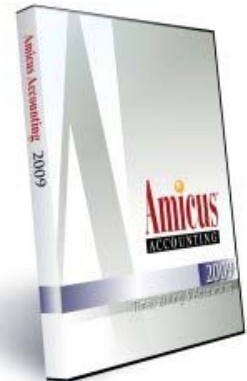
Amicus and Amicus Attorney are registered trademarks and Amicus Accounting and Amicus Mobile are trademarks of Gavel & Gown Software Inc. © 2009.  
[www.amicusattorney.com](http://www.amicusattorney.com)

## Amicus Showcase

### AMICUS ACCOUNTING

#### Reconciling Bank Accounts

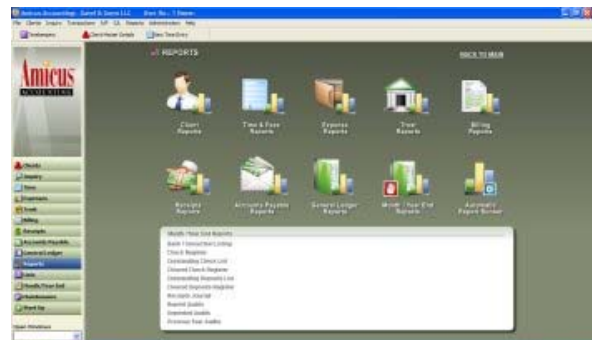
Reconciling bank accounts involves clearing checks and deposits that have cleared the bank, entering adjustments to the G/L, and printing a detailed reconciliation worksheet that compares the adjusted bank balance with the adjusted General Ledger balance. When the reconciliation is complete, you can automatically post adjustments such as bank service charges to the G/L. You can also save reconciliations to continue working on them later. It is not necessary to reconcile your banks for a month before posting in the next month (most people do not receive their bank statements until well into the next month). Be sure however to complete your bank reconciliation within the period required by the Law Society. The majority of Law Societies also require that trust bank reconciliations be signed and dated by either the individual preparing the reconciliation or by an authorized lawyer.



[ACCOUNTING FREE TRIAL](#)  
[click here](#)

To complete a bank reconciliation:

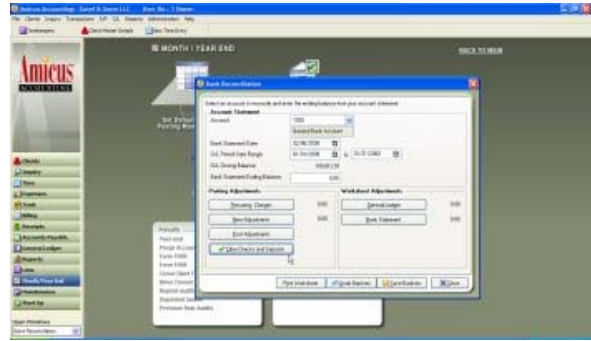
1. Make sure you have your bank statement available.
2. Go to Reports > Outstanding Check List.
3. Print an Outstanding Check List. It is recommended that you print this report before canceling checks so that if checks are canceled incorrectly, you have the original list of outstanding checks to refer to.
4. Go to Reports > General Ledger > General Ledger Reports.
5. Select Detail Journal Listing, enter your criteria and press Print. It is recommended that you view results prior to printing to confirm you have entered the appropriate date and account information.
6. If you are reconciling a trust account, go to Reports > Trust Reports.
7. Select Client Listing by Trust Back, enter your criteria and press Print. It is recommended that you view results prior to printing to confirm you have entered the appropriate date and account information.
8. Cross check the returned checks from the bank with the bank statement to ensure that all checks have been returned. If there are errors on the bank statement notify the bank immediately. Ensure all checks returned with the bank statement match all draws on your account.
9. Go to Month/Year End > Bank Reconciliation.
10. Enter the bank G/L account number, bank statement date, start and end dates for the period you are reconciling (normally the start and end dates of the bank statement) and the ending balance from your bank statement.
11. Enter or modify the Posting Adjustments if necessary. These are items on the bank statement that are to be posted into Amicus Accounting.
12. Enter or modify the Worksheet Adjustments if necessary. These are items on the bank statement that are not to be posted to Amicus Accounting but are to be shown as adjustments only (bank errors).
13. Click the Clear Checks and Deposits button.
14. Match up any checks and deposits listed in the Clear Checks and Deposits screen with those on your bank statement. For each match, place a checkmark beside the entry.
15. After you have marked all of your cleared items, the



[Reports > Year/Month End](#)

unmarked items will be considered outstanding and will appear as such in the next reconciliation period. Your Difference Calculation should read 0.

16. If your Difference Calculation is not 0 an error has been made, either in your Amicus Accounting Data Entry or by the Bank. Investigate and correct as appropriate, ensuring any corrected entries are posted to the current reconciliation period.
17. If your Difference Calculation is 0, click on Save, then Print Worksheet to print the bank reconciliation worksheet. Save a copy for your month end file.
18. Post any adjustments that were used in the reconciliation, and click Save Bankrec.
19. Go to Reports > Month/Year End Reports.
20. Select and print the Cleared Check Register report, Check Register report, Outstanding Check List report, Outstanding Deposits List report and Cleared Deposits Register report. For each report ensure the correct criteria is entered. It is recommended that you view results prior to printing to confirm you have entered the appropriate date and account information. Save hardcopies of these reports in your month end file.



[Month/Year End > Bank Reconciliation](#)

[Amicus Accounting 2009 Overview](#)

[Send to a Friend - Click Here](#)

[Unsubscribe - Click Here](#)

[Printable PDF](#)

You have received this eNewsletter as you are a current Amicus Attorney customer or have previously requested information or this newsletter from our company.

Amicus and Amicus Attorney are registered trademarks and Amicus Accounting and Amicus Mobile are trademarks of Gavel & Gown Software Inc. © 2009.  
[www.amicusattorney.com](http://www.amicusattorney.com)

