



# NEWS

September 2009 -- Volume 7, Issue 7

## What's New at Amicus?

### Upgrade to Amicus 2009 and Save up to 50%

Amicus 2009 upgrades are on sale until October 16, 2009. If you are currently running Amicus Small Firm, Amicus 7 or Amicus 2008 and want to upgrade...

[Read more](#)

## FAQ - Answers To Some Common Technical Questions

### Is it possible to make mass assignment changes on files and contacts?

Instead of editing each File or Contact individually, you can add firm members to several files and contacts at once. Here is a quick timesaving tip. To...

[Read more](#)

## Events and More

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

### State Bar of California Annual Meeting

September 11-12, 2009  
San Diego, CA

### South Carolina Bankruptcy Law Association Annual Seminar

September 11-13, 2009  
Myrtle Beach, CA

### Michigan State Bar Annual Meeting and Solo & Small Firm Institute

September 16-18, 2009  
Dearborn, MI

### Montana State Bar Annual Meeting

September 17-18, 2009  
Missoula, MT

### Nebraska State Bar Annual Meeting

October 14-16, 2009  
Omaha, NE

[See Complete Event Listings](#)

## Amicus Showcase

### PREMIUM EDITION

#### Communications Preview Pane

Preview emails, phone calls and phone messages using the preview pane in the Communications module. This resizable pane at the bottom of the screen shows details of the item selected in the...

[Read more](#)

### SMALL FIRM EDITION

#### Today's Practice Reminders

A series of checks are performed the first time you run Amicus Attorney each day. The results are then displayed in your Today's Practice Reminders page of the Dailies. You can decide...

[Read more](#)

### AMICUS ACCOUNTING

#### Monthly Lawyer Productivity

As the recession looms, law firms continue to look at ways to shore up revenue and minimize costs in order to maintain profit margins...

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### AMICUS MOBILE

#### Adding and Removing Files On An Item

With Amicus Mobile, you can add and remove File assignments on Notes and Stickies, Time Entries, and Phone Calls and Messages...

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## FAQ - Answers To Some Common Technical Questions

### "Is it possible to make mass assignment changes on files and contacts?"

Instead of editing each File or Contact individually, you can add firm members to several files and contacts at once. Here is a quick timesaving tip.

#### Amicus Attorney 2009 Premium Edition

##### Files

1. Go to the Files module.
2. Highlight the desired files to be assigned to the new firm member(s) and choose Actions > Change Assignment. The Select People dialogue opens.
3. Highlight the firm member(s) to be added to the files and click the arrow button to add them to the Assign section.
4. Click OK.

##### People

1. Go to the People module.
2. Highlight the desired contacts to be assigned to the new firm member(s) and choose Actions > Change Assignment. The Select People dialogue opens.
3. Highlight the firm member(s) to be added to the contacts and click the arrow button to add them to the Assign section.
4. Click OK.

**NOTE:** This task is best performed by a firm member who has access privileges to all firm files and contacts.

**TIP:** An Amicus Administrator can instead use the Transfer Records function to quickly transfer assignment of all types of records from a former firm member to an active firm member.

#### Amicus Attorney 2009 Small Firm Edition

##### Files

1. Ensure all users are logged out of Amicus.
2. Open the Amicus Administrator.
  - o Before making any changes, ensure that your database is backed up.
3. Choose Database > Management > User Assignments.
4. Select the Files option in the Data Type section.
5. Optionally filter the set of files you want affected in the Range section by:
  - o category
  - o type
6. Optionally filter the set of files to those already assigned to particular team members.
7. To add team members, select the Add Team Member option in the Add/Remove Team Members section, click Team Members and select them.
8. Highlight the team member to be added to the files and use the arrow key to add them to the Current Selection list.
9. Click OK.

##### Contacts

1. Ensure all users are logged out of Amicus.

2. Go to Database > Management > User Assignments.
3. Select the Contacts option in the Data Type section.
4. Optionally filter the set of contacts you want affected in the Range section to:
  - o contacts in at least one of the selected groups
  - o contacts in all of the selected groups
5. Optionally filter the set of contacts to those already assigned to particular team members.
6. Choose which contacts you want to assign the new user to by clicking on Team Members... in the Range section.
7. To add team members, select the Add Team Member option in the Add/Remove Team Members section, click Team Members and select them.
8. Highlight the team member to be added to the contacts and use the arrow key to add them to the Current Selection list.
9. Click OK.

**NOTE:** *If user groups have been used to maintain assignments, a user can simply be added to an existing group, in order to inherit all of the group's assignments. (In Amicus Administrator, choose Database > Management > Group Assignment)*

**TIP:** *To quickly transfer assignment of all types of records from a former team member to an active team member, you can instead use the Transfer License function in Amicus Administrator.*

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## Amicus Showcase

### PREMIUM EDITION

#### Communications Preview Pane

Preview emails, phone calls and phone messages using the preview pane in the Communications module. This resizable pane at the bottom of the screen shows details of the item selected in the list including associated file, message content, message type, sender/recipient, date and time, priority level and whether there are any attachments.

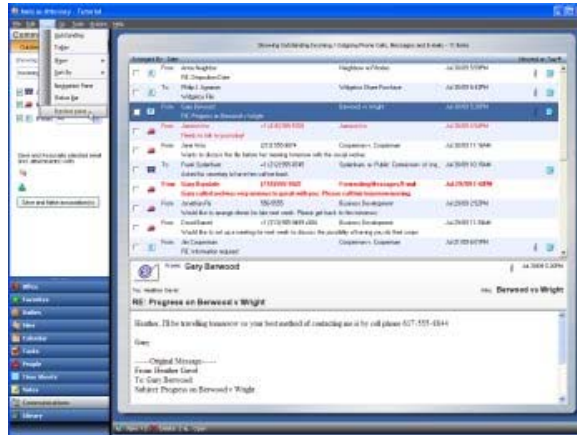
To turn this feature on or off:

1. Go to the Communications module.
2. From the View menu, choose Preview Pane.

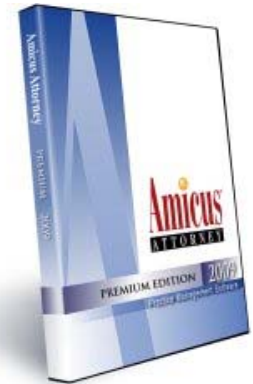
To resize the pane, drag the divider bar at the top of the pane up or down.

**TIP:** Right-click in the pane for the same menu commands available from the list, such as Reply and Forward.

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



Preview Pane



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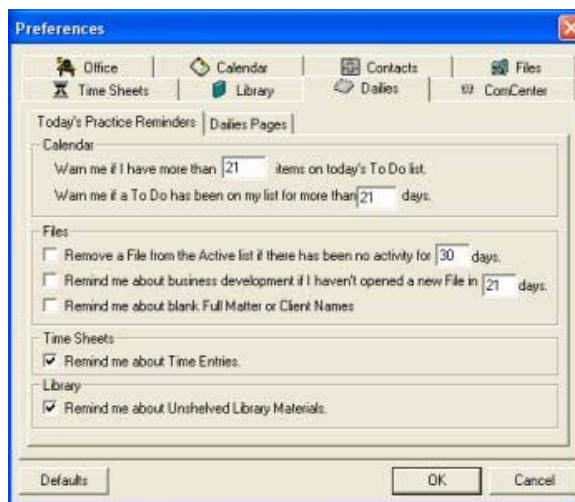
## Amicus Showcase

### SMALL FIRM EDITION

#### Today's Practice Reminders

A series of checks are performed the first time you run Amicus Attorney each day. The results are then displayed in your Today's Practice Reminders page of the Dailies. You can decide which of the following checks are helpful:

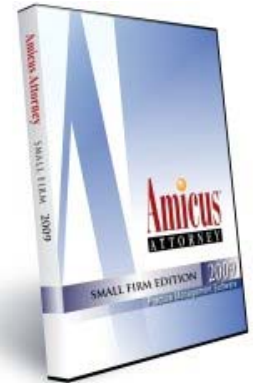
- The number of items that accumulate on your To Do list before Amicus Attorney displays a warning.
- The number of days a To Do spends on your list before Amicus Attorney displays a warning.
- How many days must elapse with no activity on a File before it is removed from your Active list.
- Whether you want to be reminded if you have not opened any new Files within a specified number of days.
- Whether you want to be reminded in the Dailies about creating Time Entries.
- Whether to be reminded about Unshelved Library materials.



[Dailies > Today's Practice Reminders](#)

To set your Today's Practice Reminders preferences choose File > Preferences and click the Dailies tab. Alternately, from the Dailies module, click the Personalize button. To revert to the standard settings, you can click Defaults.

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

#### Monthly Lawyer Productivity

As the recession looms, law firms continue to look at ways to shore up revenue and minimize costs in order to maintain profit margins.

When assessing productivity, many firms look at numbers for the whole firm. But often this will not provide granular enough information to account for changes in firm performance (either positive or negative) nor provide enough insight to make for future planning. Instead, firms should consider the following:

- 1. Track Productivity Across Staff, Clients and Practice Areas**

Looking at performance for individual attorneys, practice areas and even clients can give you a clearer picture of what factors are contributing to the financial performance of your firm. The better informed you are about the financial health of your practice; the better your decisions will be for improving your firm's financial health.

- 2. Track All Aspects of Revenue**

Your firm's revenue is not only a measure of money deposited to the bank. You should also be looking at time tracking, billing, collections and write offs.

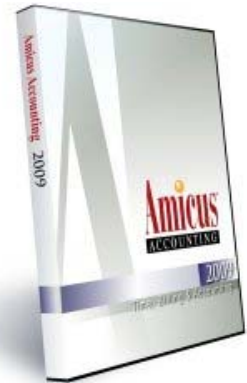
- 3. Monthly Reviews**

Productivity numbers should be reviewed on a monthly basis so you can quickly recognize good performance and areas of concern. Waiting for year end to monitor your firm's performance is often too late to make meaningful changes that impact the bottom line. Monthly monitoring also lets you identify trends and provides a basis for month to month comparisons across different years.

To help you evaluate staff productivity, Amicus Accounting offers a variety of different reports including the Lawyer Productivity Summary. This report provides a concise summary of an attorney's performance and activity for any given month to date as well as a year to date balance on a single page.

You can produce this report for one or more working attorneys. It is broken down into the most important components of law firm productivity; time tracking, billing and collections. This report essentially answers "What have I done this month to date?" for each working attorney.

The report looks as follows:



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Penny		2009 Law Firm		User: 1			
Lawyer Activity Summary							
Date of	Jul 27, 2009	Report by:	Working Lawyer				
Current Period:	Jul 01, 2009 to Jul 27, 2009	For Lawyer(s):	1 - Bobby Dossell				
Year-to-Date:	Jan 01, 2009 to Jul 27, 2009						
		CURRENT	Year to Date				
1	BILLABLE	- HOURS	30.00	1,342.00			
		- FEES	6,288.00	347,288.00			
	W.I.P.	- HOURS	30.00	342.00			
	- FEES	6,288.00	162,288.00				
	- EXP.	0.00	0.00				
	BILLED	- HOURS	0.00	1,000.00			
	- FEES	13,500.00	198,500.00				
	- EXP.	0.00	18,500.00				
2	RECEIPTS	- FEES	9,000.00	9,000.00			
		- EXP.	18,390.00	18,390.00			
	AR WRITE-OFF	- FEES	0.00	0.00			
	- EXP.	110.00	110.00				
	WIP WRITE-OFF	- FEES	0.00	0.00			
	- EXP.	0.00	0.00				
	VARIANCE	- FEES	13,500.00	13,500.00			
	- EXP.	0.00	0.00				
RECORD OF TIME INPUT (Billable • NonBillable)							
		-WED 1-	-THU 2-	-FRI 3-	-SAT 4-		
		7.50	8.50				
3	-SUN 5-	-MON 6-	-TUE 7-	-WED 8-	-THU 9-	-FRI 10-	-SAT 11-
		7.00		6.00			
	-SUN 12-	-MON 13-	-TUE 14-	-WED 15-	-THU 16-	-FRI 17-	-SAT 18-
	-SUN 19-	-MON 20-	-TUE 21-	-WED 22-	-THU 23-	-FRI 24-	-SAT 25-
	-SUN 26-	-MON 27-	-TUE 28-	-WED 29-	-THU 30-	-FRI 31-	

Lawyer Activity Summary Report

### Section 1 - Work Performed and Billed:

This section details the work the attorney has performed for the specified period:

#### Billable - How much have I worked this month?

Shows the hours worked for a period (net of write offs done prior to billing) regardless of the fee distribution on the file and the dollar value of that work (net of write offs done prior to billing). Divide the fees by the hours to calculate the effective working hourly rate (EWHR) for the selected period. Compare the current period EWHR with your Year to Date Period to see if your EWHR is improving as the year progresses.

#### W.I.P. (Work in Progress) - How much of that work is left unbilled?

Shows work performed for the corresponding period and how much was left unbilled from both an hourly and dollar value perspective.

#### Billed - How much work have I billed this month that I am entitled to?

Shows billing composition for the selected period.

**Note:** This total is based on fee distribution for the working attorney. So if I bill a client \$1000 but my partner Jane Doe is entitled 10% as a result of being the introducing attorney, the billed fees column will show \$900 (\$1,000 - 10% = \$900). This is a good report if you base attorney compensation on billed fees based on fee distribution.

### Section 2 - Receipts and AR Write Offs

This section summarizes the collection success for the specified period.

Receipts - How much did I collect for this period as a fee distribution attorney? Shows how much in fees was collected as the fee distribution lawyer (not total collections for the matter or invoice) and how much billed expenses were paid to the client. If your firm compensates attorneys based on collections and you normally split fee distribution on your cases, this is a good report to run (net this total with AR Write off).

**Note:** Expenses are always tagged to the responsible attorney so payment of expenses will be attributed to the responsible attorney.

#### AR Write-Off

Shows fees and expenses written off as a fee distribution attorney (fees) or responsible attorney (expenses). Always subtract the AR-Write-Offs from the Receipts to get the net collected value for each attorney.

#### WIP-Write-Off

Shows fees and expenses written off prior to billing. This value often represents corrections to time and expense entries and can be safely ignored.

#### Variance

Details the difference in dollar value of WIP time billed vs what is actually billed. Variance is typically calculated when users change the computed billed amount, at the time of billing.

**Note:** *This number can be skewed by contingency and flat fee cases.*

### Section 3 - Record of Time Input

This section provides a calendar view of hourly billable time totals for each day of the month.

As you can see, this report provides a concise summary of activity for the attorney for the selected time period. Run this report on a monthly basis and compare the report with previous months to uncover trends in your practice. Also compare this report across attorneys to measure relative performance.

Patterns will emerge giving you insight into the performance of your firm and staff, allowing you to make informed decisions regarding the future direction of your practice and staff. Using monthly reports in Amicus Accounting will help your firm maximize both revenue and profit potential.

**Note:** *WIP, Billing, Collections and Write Offs can also be created for responsible attorney - use the Summary by Lawyer (select Responsible Lawyer Range).*

[Amicus Accounting 2009 Overview](#)

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#### Adding and Removing Files On An Item

With Amicus Mobile, you can add and remove File assignments on Notes and Stickies, Time Entries, and Phone Calls and Messages.

To add a File:

1. Tap or click Files.
2. In the Select list, select one and tap or click Select.
  - o To jump directly to a particular File in a Select list, type the beginning of its name in the field above the list.

To remove a File:

1. Tap or click any of the assigned Files listed.
2. In the Remove list, select one and tap or click Remove

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



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