



# Integration Guide: Amicus Accounting and Amicus Attorney

**Applies to compatible versions\* of:**

- Amicus Accounting with Amicus Attorney V+ (Advanced or Client/Server Edition)
- Amicus Accounting (Small Firm Edition) with Amicus Attorney (Small Firm Edition)

\* For compatibility, see the appropriate *Hardware & Software Requirements* document, available from our website.

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## About the Integration

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Amicus users can increase the efficiency of their firm by utilizing the Amicus Attorney-Amicus Accounting integration, providing a complete front and back office practice management solution.

There is no need to enter data twice. Matter File and Client information is current regardless of where it is entered. Whether you are new to Amicus or a long time user, setup is easy. An Integration wizard guides you through configuration of the exchange options.

During the initialization process, data and common lists are transferred from Amicus Attorney to Amicus Accounting. Thereafter, Matter File and Client Contact information is individually exchanged automatically in both directions. Time entries are posted directly to Amicus Accounting without the need for a separate exchange process.

### About this Guide

In this Guide, for brevity, Amicus Attorney may be written as “ATTORNEY”, and Amicus Accounting may be written as “ACCOUNTING”.

This Guide is to be read in conjunction with the *Install and Setup Guide* for Amicus Small Firm or Amicus Accounting, as appropriate.

The first part of this *Guide* is primarily for Administrators, describing set up and maintenance of the Integration. For details on day-to-day use of the Integration functions, ATTORNEY Team Members should see “What Amicus Attorney Team Members need to know” on page 14, and ACCOUNTING users should see “What Amicus Accounting users need to know” on page 18.

### What you need

The following must be installed:

- On the Amicus Attorney File Server:
  - Amicus Administrator components for Amicus Attorney V+ (Advanced or Client/Server Edition) or Amicus Attorney (Small Firm Edition)
- On the Amicus Accounting File Server:
  - Amicus Accounting 2006 database and application components
- On the workstations of all users (including non-Timekeepers):
  - Amicus Attorney V+ (Advanced or Client/Server Edition) or Amicus Attorney (Small Firm Edition)
  - Amicus Accounting 2006 Workstation components

For an installation configuration grid, see Appendix C on page 23.

**VERSIONS:** For integration purposes, the current versions of both applications should be installed. **In particular, Amicus Accounting 2006.02 requires Amicus Attorney V+ 5.8.1 or later, or Amicus Attorney Small Firm Edition 5.9.0 or later.**

## What information is exchanged

Records are exchanged between ATTORNEY and ACCOUNTING in the directions indicated, using appropriate match criteria.

ATTORNEY record type	Exchange direction	ACCOUNTING record type
Matter Files	←————→	Clients (Client Matter Files)
Client Contact on Files		
Time Entries	————→	Time Entries

### Scope

Records are filtered based on certain criteria. The following rules apply.

#### General Rule:

- Deletions of Matter Files/Client Matters, Client Contacts/Client information, and Time Entries are not supported and therefore must be performed manually in both applications.

#### Files/Client Matters:

- Only ATTORNEY Files that are Open, are not set to be Excluded, and have a Client Contact assigned, will be exchanged. If the File is Billable, it must also have a Responsible Lawyer who is a Timekeeper. Files with the Billing Category “Vacation” or “Personal” are not exchanged.
- Only ACCOUNTING Open Clients will be exchanged.
- Updates to ATTORNEY Open Files (including updates to the Client Contact information) will be exchanged with the matching ACCOUNTING Client Matters, regardless of whether the ACCOUNTING Client Matter is Open or Closed, and vice versa.

#### Time Entries:

- ATTORNEY Time Entries are posted directly to ACCOUNTING.
- Updates to Time Entries already posted to ACCOUNTING are not supported.

## Integration checklist

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The Integration process is configured and run from Amicus Administrator. You will need to complete several steps, listed below and described in more detail throughout this *Integration Guide*. It is assumed that you have installed and configured both ATTORNEY and ACCOUNTING according to the *Install and Setup Guide* and have ensured that they are running properly.

**WARNING:** If you wish to experiment with the integration, do so in an isolated environment with test data. Do not integrate with live data until you are ready to permit general use by the firm. If your firm has set ACCOUNTING for automatic Client Matter numbering, pre-initialization will copy all existing Client IDs and Matter IDs in ATTORNEY to the Other field on the File and then initialization will assign IDs from ACCOUNTING.

- 1** Read this *Integration Guide* in conjunction with the *Install and Setup Guide* for Amicus Small Firm or Amicus Accounting, as appropriate, to gain an understanding of the best approach to integration and how data in the two applications will be exchanged and matched.
- 2** Prepare your data and configure your settings where necessary in both applications as detailed in “Preparing your data” on page 5.
- 3** Initialize the integration. See “Initializing the Integration” on page 7.

ATTORNEY and ACCOUNTING will then be ready to allow users to perform exchanges and post Time Entries.

The Team Administrator will need to maintain common list mappings (e.g. Billing Rates) on an on-going basis as items are added or deleted in either application. For more information, see “Common Lists” on page 11.

# Preparing your data

We recommend that someone with knowledge of the Client Matter data, together with the assistance of the ATTORNEY Team Administrator and ACCOUNTING Administrator, prepare for Integration configuration and initialization.

## Before initialization

Before initialization, the File Type, Timekeeper, Activity Code, and Billing Rate Label lists must be set as desired in ATTORNEY. During initialization, these ATTORNEY common lists will be automatically added in ACCOUNTING.

## Common Lists

ATTORNEY Lists	ACCOUNTING Lists
File Types (Name)	File Types (Description)
Timekeepers (First Name, Last Name)	Timekeepers (First Name, Last Name) – set to Active, Responsible Lawyer and Originating Lawyer upon initialization
Activity Codes (Name)	Activity Codes (Description)
Task-Based Billing Activity Codes (Code, Name)	Task-based Billing – Activities (Code, Description)
Task-Based Billing Task Codes (Code, Name)	Task-based Billing – Tasks (Code, Description)
Task-Based Billing Code Sets (Name)	Task-Based Billing Types (Description)
Billing Rate Labels (prefixed Name)	Billing Rate Codes (“B”–“Y”)

## Billing Rate Labels and Codes

To accommodate assignment of the Billing Rate on Accounting Client Matters, ensure that the ATTORNEY Billing Rate Labels include the ACCOUNTING Timekeeper Billing Rate Codes (B–Y) as prefixes, with a hyphen used as a separator. Do not use spaces around the hyphen. For example, ATTORNEY Label “C-Premium” will correspond to ACCOUNTING Billing Rate Code “C”. Please follow these rules:

- Do not use “A” as a prefix in any ATTORNEY Labels. ACCOUNTING Billing Rate Code. “A” always corresponds to ATTORNEY Label “Normal (Default Rate)”.
- Prefix the ATTORNEY Label “Contingency” with a digit—e.g., “2-Contingency”.
- Do not prefix the ATTORNEY Labels “Normal (Default Rate)”, “Flat Rate”, “Non-billable”, and “Other”.

## Users

If a user requires the ability to automatically launch ACCOUNTING from within ATTORNEY, including the ability to view the Account Inquiry from File Details, ensure that the user’s First and Last Names are identical in both applications.

## ATTORNEY Client Matter data

It is recommended that you add Matter and Client data to Amicus Attorney prior to initialization. If necessary, use the Amicus Administrator Import feature to bring in data from other applications. For details, see the ATTORNEY Administrator Help.

- Ensure that every ATTORNEY File eligible for exchange has a Client.
- Ensure that every billable ATTORNEY File eligible for exchange has a Responsible Lawyer who is a Timekeeper.
- Ensure that ATTORNEY does not have duplicate Contacts with different Client IDs. Duplicate Contacts might result in inconsistent data and cross-linked records. We recommend running the Duplicate Contacts utility in Amicus Administrator.
- Because an exchange will transfer only ATTORNEY Files that are Open (not Closed) and not flagged as Excluded, ensure that these are set properly. (The Excluded flag becomes available after “Amicus Accounting” has been selected as your Accounting System in Amicus Administrator.) For instructions on how to exclude ATTORNEY Files, see “Excluding an ATTORNEY File from the Integration” on page 16.

## After initialization

Before “going live”, align Billing Rate Values for each Timekeeper.

On an ongoing basis maintain list alignment:

- File Type and Timekeeper lists must be kept aligned in each application whenever items are renamed, added, or removed in either ATTORNEY or ACCOUNTING. For example, if you add a File Type in ATTORNEY, you will need to add the corresponding File Type in ACCOUNTING.
- Activity Codes, Task-Based Billing Activity Codes, Task-Based Billing Task Codes, and Task-Based Billing Code Sets that exist in ATTORNEY must also exist in ACCOUNTING. (Note that Task-Based Codes are not editable in ATTORNEY.)
- Any new Billing Rate Labels added in Attorney will require an appropriate *ACCOUNTING* Timekeeper Billing Rate Code (B-Y) as a prefix.
- If a new user requires the ability to launch ACCOUNTING from within ATTORNEY, ensure that their First and Last Names are identical in both applications.

Care should be taken when deleting common list items in either application as existing data may be affected.

## Initializing the Integration

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Initialization refers to the 'first exchange'. It involves the process of aligning common lists, the assignment of Client and Matter IDs (if ACCOUNTING is set for automatic Client Matter numbering), and the addition/linking of existing Client Matter data. An ATTORNEY Team Administrator performs the initialization from Amicus Administrator.

- 1 Prepare your data and settings in both applications (as outlined earlier in this *Guide*).
- 2 **IMPORTANT:** Back up both the ACCOUNTING and ATTORNEY databases.
- 3 Ensure that all users are logged out of ACCOUNTING, and that all other users are online and logged out of ATTORNEY.
- 4 In Amicus Administrator, choose Configure > Time Sheets and click the Accounting System tab.
- 5 Select "Amicus Accounting" in the accounting system list box.



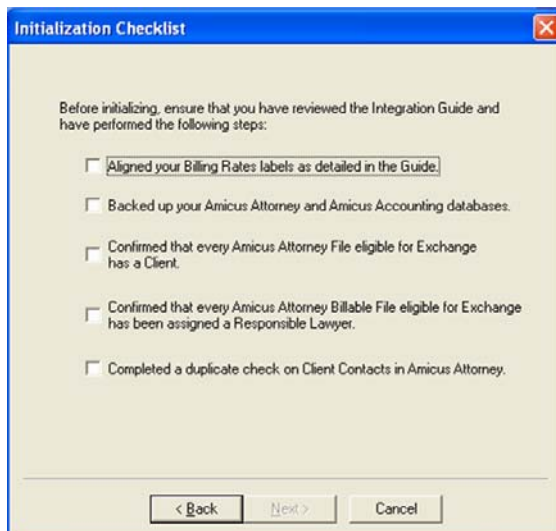
- 6 Click Configure to open the Integration wizard.
- 7 On the first page of the dialog, set the exchange preference.



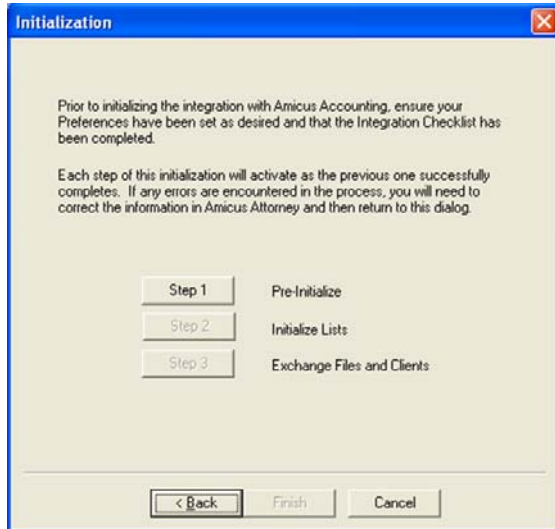
When a File/Client Matter is updated in either application, updates to the Responsible Lawyer field can be ignored if desired.

**NOTE:** If you need to change this option later (after initialization), simply open the Integration wizard again, set the option, click Next, and click Cancel.

- 8** The next two File Field Mapping pages are for information purposes only. Review each and click Next.
- 9** On the Initialization Checklist page, select each of the checkboxes to confirm you have completed the corresponding step. Then, click Next.



**10 Step 1 - Pre-initialization check**—Click Step 1 to start the preliminary data check process.



- If the preliminary check completes successfully, the Step 2 button becomes available. Note that, if ACCOUNTING is set for automatic Client Matter numbering, all Client IDs and Matter IDs have now been cleared from those fields in ATTORNEY Files and the original ID values copied to the Other field in the Administration - Client & Matter brad of File Details.
- If the preliminary check DOES NOT complete successfully, a failure message appears. Click OK and the error log opens. All issues reported at this stage must be resolved before you can proceed to Step 2.

**11 Step 2 - Initialize lists**—Click Step 2 to copy ATTORNEY list items to the ACCOUNTING lists. This will ensure that they are present and have identical names:

- Timekeepers—as both Responsible Lawyers and, Originating Lawyers
  - File Types
  - Activity Codes
  - Task-Based Billing Activity Codes
  - Task-Based Billing Task Codes
  - Task-Based Billing Code Sets
- If the Timekeeper and File Type lists align successfully, the Step 3 button becomes available.
  - If any of the lists DO NOT align successfully, a failure message appears. Click OK and the error log opens. Timekeeper and File Type alignment issues must be corrected before you may continue with the initialization. We recommend that any other alignment issues also be resolved before processing transactions.

**12 Step 3 - Exchange Files and Clients**—Click Step 3 to start the exchange of eligible Files and Client Contacts from ATTORNEY to ACCOUNTING. Files and Clients exchange in only one direction during initialization.

- If the initialization completes successfully, a success message appears.
- If the initialization either completes with errors or fails, a corresponding message appears. Click OK and the error log opens. Errors that cause a failure to initialize must be resolved. We recommend that all other errors also be resolved before processing transactions.

**13** Click Finish. The Integration is now initialized.

## Error logs

The error log file records any errors encountered during initialization or later exchanges. It is named *AmicusAccountingLog\_MMMMDD\_YYYY.log* (where *MMMMDD\_YYYY* represents the month, day, and year that the errors are generated). Any additional errors generated during a day are appended to the bottom of the log for that day.

The error log is stored in the *TEMP\AmicusLogs* folder on your computer (where *TEMP* refers to your Windows Temp folder). (To locate your Temp folder, type `%temp%` in the Address field of Windows Explorer and press ENTER.) The Amicus Attorney Server and each workstation at which exchanges are performed will each have their own error log.

## Reinitializing the Integration

The ATTORNEY Team Administrator can reinitialize the Integration if necessary.

**WARNING: We highly recommend that you reinitialize the Integration only with the assistance of Gavel & Gown Technical Support (at 1-800-472-2289).** The Integration might be necessary after restoring a backup in ATTORNEY or ACCOUNTING, or recovering a database.

To reinitialize the Integration, repeat all initialization steps described above, including database backups. Unlike the first initialization (if ACCOUNTING was set for automatic Client Matter numbering), this will NOT affect existing Client IDs and Matter IDs.

## Initialization and exchange details

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The following sections describe **how records are matched** and **how fields are mapped** in order to facilitate the proper exchange of information to records that are updated or newly created in the other application.

For details on field mapping, see “Appendix A: File/Client Matter field mapping” on page 19 and “Appendix B: Client Contact/Client field mapping” on page 21.

### Important Concepts

ACCOUNTING Client Matters are equivalent to ATTORNEY Files. The Integration establishes a link between matching ACCOUNTING Client Matters and the ATTORNEY File. This controls the flow of data and avoids duplicate Client Contact records. Note that, unlike ATTORNEY, which has unique Client Contact records that may be associated with one or more Files, ACCOUNTING Client Matter records contain both Client information and Matter information.

Initialization/exchange will create a new File in ATTORNEY when an ACCOUNTING Client Matter does not have an equivalent File in ATTORNEY.

**IMPORTANT:** We recommend that users create Files/Clients in either ATTORNEY or ACCOUNTING, not both, to help avoid the creation of duplicates.

### Exchange methods for Client Matter Files

**Individual File Exchange**—involves a single ATTORNEY File (and its associated Client Contact record) or a single ACCOUNTING Client Matter. This occurs automatically whenever an eligible ATTORNEY File is added or updated, or an eligible ACCOUNTING Client Matter is added or updated.

**User File Exchange**—involves all of an individual user’s ATTORNEY Files (and associated Client Contact records) that have been changed since they were last exchanged. This step is necessary after a user unpacks a Secondary Office Briefcase, goes Online after having been Offline, etc. To perform a User File Exchange, choose **FILES > Amicus Accounting Exchange** from the Files Index screen in the individual user’s ATTORNEY Office.

### Match criteria for Client Matter Files

Eligible records that meet the scope requirements (see “What information is exchanged” on page 3) are matched based on the **Key Identifiers** in each record. This matching is not case sensitive, but spaces and punctuation do matter.

- **If a match is not found**, the Integration will create a new record so that there are corresponding records in both applications.
- **If a match is found**, either the ATTORNEY record or the ACCOUNTING record is updated, as appropriate.
- **If more than one match is found**, an error is logged.

## Primary match criteria

The first match attempted is an ACCOUNTING Client Matter exactly corresponding to an ATTORNEY File, or vice versa. The Key Identifiers are **Client ID and Matter ID**.

### If Accounting is set for automatic Client Matter numbering:

- Each ACCOUNTING Client Matter has a unique Client Matter ID that identifies the Client Matter. In ATTORNEY, each File has a Client ID and Matter ID that will be automatically assigned from ACCOUNTING upon initialization/exchange.
- ACCOUNTING assigns IDs automatically. The Client Matter ID is composed of a unique Client ID (up to 15 digits) followed by a Matter ID (up to 10 digits, typically 3 digits: 001, 002, etc.).
- **NOTE:** During initialization, any Client and Matter IDs previously stored in ATTORNEY Files will be cleared, and new IDs will be assigned from ACCOUNTING. For audit trail purposes, these former IDs will be stored in the Other field of the ATTORNEY File's Admin - Accounting view.
- **WARNING:** Turning off the ACCOUNTING automatic numbering option later will enable you to manually enter IDs going forward but will not permit you to change the IDs of any existing Client Matter Files that have already been linked. **DO NOT ATTEMPT TO CHANGE IDs ON FILES THAT HAVE ALREADY BEEN EXCHANGED.** Doing so will cause Files to duplicate on either or both sides of the Integration and might result in data corruption.

### If Accounting is NOT set for automatic Client Matter numbering:

- Each ACCOUNTING Client Matter and ATTORNEY File has a unique Client ID and Matter ID that identifies the Client Matter.
- Users will enter IDs. The Client Matter ID is composed of a unique Client ID (up to 15 characters) followed by a Matter ID (up to 10 characters).
- **NOTE:** During initialization, any Client and Matter IDs previously stored in ATTORNEY Files will be kept as is.

## Secondary match criteria

If an exact ACCOUNTING Client Matter-ATTORNEY File match is not found, a match between clients is attempted. The Key Identifier is **Client ID**.

The Client ID portion of the ACCOUNTING Client Matter ID corresponds to an ATTORNEY Client ID.

## Additional match criteria

If the exchange is from ACCOUNTING to ATTORNEY and the above criteria (Client ID + Matter ID, and Client ID alone) have failed, a final attempt is made to find a matching ATTORNEY Contact. The Key Identifiers are **Name and Phone**.

- If the ACCOUNTING Client has been flagged as an Individual, an ATTORNEY Contact record must be an individual to be eligible for a match. An ATTORNEY Contact is considered to be an individual if it has a First Name and/or Last Name (with or without a Company Name).

### Key Identifier fields if an Individual:

Attorney Contact field	ACCOUNTING Client Matter field (Client Details)
First Name	First Name
Last Name	Last Name

Attorney Contact field	ACCOUNTING Client Matter field (Client Details)
Primary Phone	Home Phone

- If the ACCOUNTING Client has been flagged as a Company, an ATTORNEY Contact record must be a company to be eligible for a match. An ATTORNEY Contact is considered to be a company if it has only a Company Name.

**Key Identifier fields if a Company:**

Attorney Contact field	ACCOUNTING Client Matter field (Client Details)
Company Name	Company Name
Primary Phone	Business Phone

## Time Entries

Time Entries in ATTORNEY are exchanged with ACCOUNTING in one direction—from ATTORNEY to ACCOUNTING. Time Entries are sent to ACCOUNTING through the Posting function in the Time Sheets module. This model maintains the law firm workflow within which lawyers are accustomed to working. It allows the lawyer to be confident that the Time Entries will not be billed until they are finalized.

If a Timekeeper Unposts a Time Entry from ATTORNEY, the corresponding Time Entry in ACCOUNTING should be Reversed.

## Timekeepers

When the Integration is initialized, the ATTORNEY Team Members who are designated Timekeepers will be automatically exchanged in one direction, to the ACCOUNTING list of Timekeepers. The First Name, Last Name, and Initials are exchanged. Timekeepers exchanged are entered as both Responsible Lawyers and Originating Lawyers in ACCOUNTING.

## What Amicus Attorney Team Members need to know

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Once the ATTORNEY Team Administrator has configured and initialized the Integration, ATTORNEY Team Members can use the Integration functions in various ways, including:

- Adding or updating a File in ATTORNEY and sending it to ACCOUNTING.
- Excluding a File from exchanges.
- Displaying the ACCOUNTING Account Inquiry view of a Client Matter from within ATTORNEY.
- Creating and posting Time Entries from ATTORNEY to ACCOUNTING.

### Amicus Accounting access

If ACCOUNTING is not already open, it opens automatically (so that exchanges may take place) when you do any of the following:

- open Amicus Administrator
- open Amicus Attorney
- create a new or edit a File eligible for exchange in ATTORNEY
- edit a linked Client from within a File eligible for exchange in ATTORNEY
- post a Time Entry in ATTORNEY

ACCOUNTING opens in either of the following ways:

- If you are exactly defined as an ACCOUNTING User, ACCOUNTING opens fully, and you will be automatically logged in under your user account. Those who require access to both applications should have their Team Member/User names aligned: First Name and Last Name should match exactly.
- If you are NOT exactly defined as an ACCOUNTING User, ACCOUNTING opens minimized in the Windows Taskbar, with no functions available.

### When exchanges occur

**Individual File Exchange**—ATTORNEY data is exchanged to ACCOUNTING immediately when you:

- exit File Details for a new File
- exit File Details for an existing, previously exchanged File if any of its key fields have changed

**User File Exchange**—ATTORNEY data is exchanged when you choose FILES > Amicus Accounting Exchange from the Files Index screen. This command exchanges any of your Files that have been added to or changed in your local database but have not yet been exchanged. You should perform this action whenever you:

- unpack a Secondary Office Briefcase
- go Online after having been Offline
- edit any key fields in a Client Contact if that record was not accessed via a File that was eligible for exchange
- are instructed to do so by your Team Administrator, who may require this following an import of data from another application

**Time Entries**—ATTORNEY data is posted to ACCOUNTING immediately when you:

- post Time Entries from the Time Sheets module

## Adding or editing a File

**RECOMMENDED:** All new Files/Client Matters should be created either in ATTORNEY only or in ACCOUNTING only, according to the firm's policy.

### Required fields

When you add a new File in ATTORNEY, it must contain certain information in order for it to be eligible for exchange with an Accounting Client Matter:

- Short File Name
- Client ID and Matter ID (if ACCOUNTING is NOT set for automatic Client Matter numbering)
- File Type
- Client Contact (who must have a State and Country assigned)
- Responsible Lawyer (who must be a Timekeeper if the File is billable)

**TIP:** In ATTORNEY, use the 2-letter postal abbreviations for states and countries and, in your Preferences > Contacts > New Entries, set a default State and Country.

### Client and Matter IDs

If ACCOUNTING is set for automatic Client Matter numbering, then upon successful exchange of a new File, the Client ID and Matter ID automatically assigned by ACCOUNTING will appear in the Administration > Accounting brad of the ATTORNEY File Details window.

### Non-editable fields

If ACCOUNTING is set for automatic Client Matter numbering, Client ID and Matter ID fields are not editable in Files.

If ACCOUNTING is NOT set for automatic Client Matter numbering, Client ID and Matter ID fields are not editable in Files once they are created.

Once a File has been saved (and exchanged), the Client whose Client ID is assigned to the File may not be removed.

### Closing a File

If you Close a File in ATTORNEY, it will no longer be exchanged to ACCOUNTING. (The corresponding Client Matter in ACCOUNTING will not be Closed automatically.)

## Using the Accounting brad

The Administration > Accounting brad of the ATTORNEY File Details window shows how a File is linked to a record in ACCOUNTING and provides a checkbox to exclude the File from the Link.

The screenshot shows a web-based form titled "Accounting" with a dropdown menu. The form contains the following fields and controls:

- Client ID: 60233 (with an "Edit" button)
- Matter ID: 001 (with an "Edit" button)
- Billing Category: Billable (dropdown menu)
- Billing Rate: Y-Flat Rate (dropdown menu) and 200.00 (text input)
- Task-based billing
- Exclude this File from Accounting Link

Below the form, the text reads: "Amicus Accounting ClientMatter ID 60233001". Further down, it says: "The Amicus Accounting Client for this Matter is: Janet Baly" and "Contact information for this Client is exchanged." At the bottom, there is a button labeled "Account Inquiry" and the text "View Current Balances and other details:".

### Excluding an ATTORNEY File from the Integration

To exclude an ATTORNEY Open File from exchanges, select the Exclude This File checkbox. If the File is already linked to an ACCOUNTING Client Matter, the link with the corresponding ACCOUNTING Client Matter is maintained, but the File is excluded from any future exchanges.

If you clear the Exclude This File checkbox in an existing File, and the File is otherwise eligible for exchange, it will be exchanged when you save it.

## Viewing the Account Inquiry screen

The ACCOUNTING Account Inquiry screen shows current balances, Time Entries, Trust transactions, and Accounts Receivable either for a single Client Matter or all of a Client's Matters.

If you are a User in ACCOUNTING, you may view this screen from within ATTORNEY in either of the following ways:

- Open the File Details window, go to the Administration > Accounting brad, and click the Account Inquiry button at the bottom.
- Open the Contact Details window, go to the All Files brad, and click the Inquiry button at the top right.

For more information about the contents of this screen, see the ACCOUNTING Online Help. Note that the ACCOUNTING Client Matter Details may be viewed in this window but they are editable only from ACCOUNTING (if the user has been granted corresponding rights in ACCOUNTING).

## Posting Time Entries

You can post Time Entries directly from ATTORNEY to ACCOUNTING, from the Time Sheets module. In order to post a Time Entry successfully, the following conditions must be met:

- The ATTORNEY File associated with the Time Entry must already be linked to, and exchangeable with, an ACCOUNTING Client Matter.
- The ATTORNEY Timekeeper who owns the Time Entry must match a valid ACCOUNTING Timekeeper.

The Time Entry's rate value and time are transferred. Make sure your ATTORNEY preferences for minimum and rounding up times are set appropriately. For more information about posting Time Entries, see the "Time" topics in the ATTORNEY User Help. The following table illustrates how Time Entries with special Billing Rates are exchanged to ACCOUNTING.

ATTORNEY Time Entry	ACCOUNTING Time Entry
<b>Billing Rate = Non-billable</b> Rate Value = <i>(none)</i> Duration = 5.00	Rate = 0.00 Hours = 5.00 Fees = 0.00
<b>Billing Rate = Contingency</b> Rate Value = <i>(none)</i> Duration = 5.00	Rate = 0.00 Hours = 5.00 Fees = 0.00
<b>Billing Rate = Flat Rate</b> Rate Value = 300.00 Duration = 0.00 *	Rate = 0.00 Hours = 0.00 Fees = 300.00
<b>Billing Rate = Other</b> Rate Value = 300.00 Duration = 5.00	Rate = 300.00 Hours = 5.00 Fees = 1,500.00
* If the ATTORNEY Billing Rate is Flat Rate, you may enter a Duration but it will not be exchanged to the ACCOUNTING Hours field and will not affect the ACCOUNTING Fees value.	

Non-Timekeepers cannot post Time Entries from their own Office. However, any Team Member with permission may open a Timekeeper's Office in ATTORNEY and post Time Entries for that Timekeeper.

## What Amicus Accounting users need to know

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Once the ATTORNEY Team Administrator has configured and initialized the Integration, ACCOUNTING users can utilize the Integration functions when adding or updating a Client Matter in ACCOUNTING.

### Amicus Attorney access

If ATTORNEY is not already open when you log in to ACCOUNTING, or save a new or edited Client Matter in ACCOUNTING, ATTORNEY opens automatically so that the exchange may take place. If the workstation's Team Member has set ATTORNEY to require a Password, a login prompt for that information appears.

### When exchanges occur

ACCOUNTING data is exchanged to ATTORNEY immediately when you:

- save Client and Matter Details for a new Client Matter
- save Client or Matter Details for an existing, previously exchanged Client Matter if any of its key fields have changed

### Adding or editing a Client Matter

**RECOMMENDED:** All new Files/Client Matters should be created either in ATTORNEY only or in ACCOUNTING only, according to the firm's policy.

#### Client and Matter IDs

If ACCOUNTING is set for automatic Client Matter numbering, Client ID and Matter ID are automatically assigned to Client Matters. Otherwise the user will need to enter IDs. Upon successful exchange of a new Client Matter with ATTORNEY, the Client ID and Matter ID are automatically assigned to the ATTORNEY File.

#### Closing a Client Matter

If you Close a Client Matter in ACCOUNTING, it will no longer be exchanged to ATTORNEY. (The corresponding File in ATTORNEY will not be set to Closed automatically.)

#### Updating Client information

Changes made to Client information (including first, middle, and last name, address, phone numbers, etc.) will propagate to all Matters for that Client. These changes are then exchanged with the corresponding Client Contact in ATTORNEY.

**IMPORTANT:** If you change any Client Matters while there is no connection to ATTORNEY, you will later need to open and save each of those individual Client Matters in order to "trigger" the exchange.

## Appendix A: File/Client Matter field mapping

### Client Matter File creation

The following field mapping is used when an ATTORNEY File is **created** from an ACCOUNTING Client Matter, or vice versa.

ATTORNEY File field	Exchange direction for new records	ACCOUNTING Client Matter field (Matter Details)
Short File Name	↔	Short File Name
Full Matter Name	↔	Matter Description <i>On creation of a new Accounting Client Matter from an Attorney File that lacks a Full Matter Name, the Short File Name is used.</i> <i>On creation of a new Accounting Client Matter from an Attorney File with a long Full Matter Name, the first 255 characters are used as the Matter Description.</i>
<i>If ACCOUNTING is set for automatic Client Matter numbering:</i>		
Client ID + Matter ID	←	Client ID + Matter ID
<i>If ACCOUNTING is NOT set for automatic Client Matter numbering:</i>		
Client ID + Matter ID	↔	Client ID + Matter ID
File Type	↔	File Type
File Opened (date)	↔	Date Opened
Responsible Lawyer	↔	Responsible Lawyer
File Billing Rate	↔	Billing Rate
File Billing Rate value (if File Billing Rate is "Other" or "Flat Rate") *	↔	Default Rate
Task Based Billing (checkbox)	↔	Task Based Client (checkbox)
(Task-Based Billing) Code Set	↔	Task Code Set
* If the ATTORNEY File Billing Rate is contingency, no value is exchanged with the ACCOUNTING Client Matter Billing Rate. NOTE: The ATTORNEY Full Client Name and ACCOUNTING Client Name (in Client Details) are automatically filled based on Client/Contact Name.		

## Client Matter File updating

The following field mapping is used when an ATTORNEY File is **updated** from an ACCOUNTING Client Matter, or vice versa.

ATTORNEY File field	Exchange direction for updates	ACCOUNTING Client Matter field (Matter Details)
Short File Name	————▶	Short File Name
Full Matter Name	◀————▶	Matter Description
Client ID + Matter ID	Not updated	Client ID + Matter ID
File Type	————▶	File Type
File Opened (date)	Not updated	Date Opened
Responsible Lawyer	<i>Optional</i> ◀————▶	Responsible Lawyer <i>Optionally, on exchange of an updated ATTORNEY File or ACCOUNTING Client Matter, that Responsible Lawyer is assigned in the other application.</i>
File Billing Rate	◀————▶	Billing Rate
File Billing Rate value (if File Billing Rate is "Other" or "Flat Rate") *	◀————▶	Default Rate
Task Based Billing (checkbox)	◀————	Task Based Client (checkbox)
(Task-Based Billing) Code Set	◀————	Task Code Set

\* If the ATTORNEY File Billing Rate is contingency, no value is exchanged with the ACCOUNTING Client Matter Billing Rate.

## Appendix B: Client Contact/Client field mapping

### Client creation

The following field mapping is used when an ATTORNEY Client Contact is **created** from an ACCOUNTING Client, or vice versa. "ATTORNEY Client Contact" refers only to the Client eligible for exchange.

ATTORNEY Contact field	Exchange direction for new records	ACCOUNTING Client Matter field (Client Details)
<i>Only if Individual:</i> First Name	←→	<i>Only if Individual:</i> First Name
Middle Name		Middle Name
Last Name		Last Name
Company Name	←→	Company Name
Individual/Corporation	←→	Individual/Company
Primary Address: Street 1st Line *	←→	Address 1
Primary Address: Street 2nd Line *	←→	Address 2
<i>Only two lines of Address information are exchanged. We recommend that you not enter more lines of information in ATTORNEY.</i>		
Primary Address: City *	←→	City
Primary Address: State/Province *	←→	State
Primary Address: ZIP/Postal Code *	←→	Zip Code
Primary Address: Country*	←→	Country
Business Phone	←→	Bus Phone
Business 2 Phone	←→	Bus 2 Phone
Business Fax	←→	Bus Fax
Home Phone	←→	Home Phone
Home Fax	←→	Home Fax
Cell Phone	←→	Cell Phone
Primary E-mail *	←→	E-Mail Address

\* Depending on the type of Accounting Client information being exchanged, the Attorney Business or Home Address and E-mail will be filled in. See "Address and E-mail Mapping" on page 22.

NOTE: A new ATTORNEY Client created from an ACCOUNTING Client Matter will be assigned to the Group "Clients".

NOTE: The ACCOUNTING Full Client Name (in File Details) is automatically filled based on the ACCOUNTING Last, First, and Middle Name or Company Name.

## Client updating

The following field mapping is used when an ATTORNEY Client Contact is **updated** from an ACCOUNTING Client, or vice versa.

ATTORNEY Contact field	Exchange direction for updates	ACCOUNTING Client Matter field (Client Details)
<i>Only if Individual:</i> First Name Middle Name Last Name	←→	<i>Only if Individual:</i> First Name Middle Name Last Name
Company Name	←→	Company Name
Individual/Corporation	Not updated	Individual/Company
Primary Address: Street 1st Line *	←→	Address 1
Primary Address: Street 2nd Line * <i>Only two lines of Address information are exchanged. We recommend that you not enter more lines of information in ATTORNEY.</i>	←→	Address 2
Primary Address: City *	←→	City
Primary Address: State *	←→	State
Primary Address: ZIP/Postal Code *	←→	Zip Code
Primary Address: Country/Region *	←→	Country
Business Phone	←→	Bus Phone
Business 2 Phone	←→	Bus 2 Phone
Business Fax	←→	Bus Fax
Home Phone	←→	Home Phone
Home Fax	←→	Home Fax
Cell Phone	←→	Cell Phone
Primary E-mail *	←→	E-Mail Address

\* Depending on the type of Accounting Client information being exchanged, the Attorney Business or Home Address and E-mail will be filled in. See "Address and E-mail Mapping" on page 22.

## Address and E-mail Mapping

Which ATTORNEY Address and E-mail fields are filled in depends on whether the new or updated ACCOUNTING Client information being exchanged is for an Individual or a Company:

- If the ACCOUNTING Client information is for an **Individual**, the ATTORNEY Contact **Home** Address and **Home** E-mail will be filled in. If this is a new ACCOUNTING Client, the ATTORNEY Contact Home card will also be marked Primary.
- If the ACCOUNTING Client information is for an **Company**, the ATTORNEY Contact **Office** Address and **Business** E-mail will be filled in. If this is a new ACCOUNTING Client, the ATTORNEY Contact Office card will also be marked Primary.

## Appendix C: Installation Configuration Grid

SERVER	USER WORKSTATION
<ul style="list-style-type: none"> <li>• Amicus Administrator components of Amicus Attorney</li> <li>• Server components of Amicus Accounting</li> </ul>	<p><i>Workstation components of:</i></p> <ul style="list-style-type: none"> <li>• Amicus Attorney</li> <li>• Amicus Accounting</li> </ul>
<p><i>For purposes of integration, workstation components of Amicus Attorney are NOT required on the Server. Subsequent day-to-day exchanges occur between the workstation components.</i></p> <p><i>If you wish to use separate computers as servers for Amicus Attorney and Amicus Accounting, you must install Amicus Accounting workstation components on the Amicus Attorney Server.</i></p> <p><i>If using a split install of Amicus Attorney V+ Client Server Edition, note that Amicus Accounting is NOT required on the Amicus Attorney Database Server.</i></p>	<p><i>For purposes of integration, every user of either application requires BOTH applications installed at their workstation .</i></p>

### For further information, contact



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