Synchronize your Amicus and Google contacts and appointments.

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About the Link

The Amicus Google Contacts & Calendar Link provides bi-directional synchronization that aligns your Amicus and Google Contacts and Appointments, and optionally Amicus Firm Members. And the sync is server-side. That means your Amicus workstation doesn’t have to be running when the sync takes place—a sync takes place automatically about every 15 minutes, regardless. And your assistant can do an immediate sync for you if necessary. You stay up to date when away from the office.

Only Amicus Contacts and Appointments that are individually designated by you are synchronized. You select which of your Google Calendars to synchronize. All of the Contacts in your Google “My Contacts” Group are included.

The Google Link is ideal for Firm Members use Google Sync with their mobile device (iPhone, iPad, Android, Blackberry, etc.).

This document provides details about what information is synchronized and when. A configuration wizard guides each user through the steps necessary for setting up and initializing the Link. Information is provided on resetting the Link, and ensuring that the feature runs smoothly.

**IMPORTANT:** A Firm Member cannot enable both the Google Link and the Outlook Contacts & Calendar Link at the same time, and switching between the Outlook and Google Links on a regular basis is not recommended. This will avoid data conflicts.

What you need

The Amicus Google Contacts & Calendar Link requires:

- Installed on the Amicus Application Server:
  - Amicus Attorney Premium 2015 Server (with or without Premium Billing), accessible from the user workstations

- Installed on the workstations of users who wish to configure and use the Link:
  - Amicus Attorney 2015 Premium Workstation

- Each user requires a Google Account or Google Apps Account

**IMPORTANT:** Ensure that the Windows Time Zone and Date/Time settings on all Workstations match those on the Amicus Server. Server and Workstation times must be synchronized with UTC to avoid lost transactions. Each user should ensure that the Google Calendar they choose to sync with is set to the desired time zone.
Advantages of using the Link

Regardless of the handheld device used, mobile professionals can merge their Contacts and Appointments with their Amicus data by employing the Link, provided that the device can synchronize with Google.

Jane is a busy litigation lawyer who uses Amicus to manage her practice. She always carries her iPhone with her. While out of town meeting with a client, John Smith, Jane uses her phone to set up an appointment for them to meet again to further discuss the details of his case. She enters the name of John’s matter file in the Notes section. Jane’s phone automatically synchronizes with her Google account. When she returns to the office the next day, opens Amicus, and performs a synchronization with Google, her Amicus Calendar and John’s matter File display the new Appointment.

Bob sets up a Google account in order to access his contact and appointment information from home or any other place that he can connect to the Internet. While Bob is away, automatic syncs continue to occur, ensuring that any changes to items that Bob makes in Google are synchronized to Amicus for other Firm Members, and vice versa.
## Link overview

The Link can synchronize Amicus People and Firm Members with Google Contacts, and Amicus Appointments with Google Appointments.

## Synchronization direction

Each Firm Member can set the direction in which records are synchronized during initialization, and also the direction that new records, updates, and deletions are synchronized subsequently. For example, the Link can be set to synchronize Contact deletions in both directions, one direction only, or not at all.

<table>
<thead>
<tr>
<th>AMICUS</th>
<th>Optional sync</th>
<th>GOOGLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amicus Contacts selected for sync</td>
<td>←→</td>
<td>Contacts in your Google My Contacts Group</td>
</tr>
<tr>
<td>Amicus Firm Members</td>
<td></td>
<td>Contacts in your Google My Contacts Group</td>
</tr>
<tr>
<td>Amicus Appointments selected for sync</td>
<td>←→</td>
<td>Appointments in your Google selected My Calendar</td>
</tr>
</tbody>
</table>

Firm Members are only synchronized in one direction—from Amicus to Google.

## When synchronizations occur

There are four ways in which a sync occurs.

<table>
<thead>
<tr>
<th>When synchronizations occur</th>
<th>Sync direction</th>
<th>Which records synchronize</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you initialize the Link</td>
<td>One direction, as chosen by you</td>
<td>Your designated Contacts and/or Appointments in Google or Amicus</td>
</tr>
<tr>
<td>On the polling interval (every 15 minutes), regardless of whether or not Link users are logged in to Amicus</td>
<td>Both directions</td>
<td>Updates to your Contacts and/or Appointments in Google and Amicus, including changes made by other Firm Members to shared Amicus records flagged by you for synchronization</td>
</tr>
<tr>
<td>When you add, change, or delete an Amicus Contact or and Appointment you have selected for synchronization</td>
<td>Amicus to Google</td>
<td>Only that particular Amicus Contact or Appointment</td>
</tr>
<tr>
<td>When you manually perform a sync from the Amicus Tools menu</td>
<td>Both directions</td>
<td>Updates to your Contacts and/or Appointments in Google and Amicus, including changes made by other Firm Members to shared Amicus records flagged by you for synchronization</td>
</tr>
</tbody>
</table>
Administering the Link at the firm level

Amicus Administrator checklist

The Amicus Administrator should complete the following steps:

1. Read this *Amicus Google Contacts & Calendar Link Guide*.

2. Ensure that the Windows Time Zone and Date/Time settings on all Amicus Workstations match those on the Amicus Server. Server and Workstation times must be synchronized with UTC to avoid lost transactions.

3. From the Server, back up the Amicus database before Firm Members start initializing their Links.

4. Grant Firm Members Access rights to configure and initialize their Link in Amicus. For performance reasons, we do not recommend that all Firm Members initialize their Links at the same time. Therefore, you should consider granting Access rights to Firm Members only one Profile at a time.

Ensuring that Firm Members have access rights

In order for Firm Members to use the Link, the Amicus Administrator must grant individuals access rights to this feature. For performance reasons, we do not recommend that all Firm Members initialize the Link at the same time. Therefore, Administrators should consider granting access rights to Firm Members only a few at a time.

To verify whether Firm Members have been granted access rights:


2. In the Profile list box, select the Profile assigned to the Firm Members for whom you want to provide access, and click Edit at the bottom of the view. It is not necessary to grant these rights to all Firm Members—only those who wish to use the Link.

3. Choose the Office module in the Profile navigation list at the left, and then choose Actions. A list of settings appears. To enable access to the Google Link view, select the appropriate checkbox (or clear the checkbox to disable access).

4. Click Save.

After a Firm Member is granted access rights to use the Link, they can proceed to set their own Link preferences and initialize from the Preferences view of their Amicus Office module.
Configuring the Link

Firm Member checklist

Each Firm Member should complete the following steps before initializing their Link.

1. Read this Amicus-Google Contacts & Calendar Link Guide to gain an understanding of how information in the two applications will be synchronized and matched.

2. For initialization purposes, decide which application has the most accurate data and should therefore take priority in the synchronization of Contacts and Appointments.

3. If you will be synchronizing Appointments, ensure that you have an appropriate My Calendar in Google. Consider creating a separate, Calendar (e.g. “My Amicus Calendar”) for syncs with Amicus if you wish to prevent mixing those Appointments with your primary Google Calendar.

   **IMPORTANT:** Check that your Google Calendar’s Time Zone is set.

4. To avoid duplicates, ensure that matching records have the same information in the fields used for matching, e.g. Appointment Titles.

5. Set your Link preferences through the Link Configuration wizard (available from the Preferences view of the Office module). See the following sections for full details.

6. Advise your Amicus Administrator that you are ready to initialize the Link.

7. Start the initialization through the Link Configuration wizard.

Special note if upgrading from an earlier version of Amicus Premium

If you were using the Google Calendar Link in an earlier version of Amicus, you'll need to redo Step 1 of the Link Configuration Wizard (see the next section).

Due to limitations imposed by Google, only new items and changes made in Google within the last 20 days will be processed. If you wish to include Google items older than 20 days, you'll need to reinitialize the Link.
Using the Link Configuration wizard

To configure the Link, choose Preferences on the navigation list in the control panel in the Amicus Office module. Choose Links > Calendar & Contacts Integrations in the Preferences view that appears.

Choose the Google option and then click Configure to start the Link Configuration wizard. The Welcome dialog of the wizard appears.

The current completion status of each step is shown at the right.

Complete each of the steps in the wizard dialogs, as described in the following sections.
Step 1 - Specify your basic synchronization settings

In the Google Settings dialog, click Connect with Google.

Enter your Google account credentials and sign in, or simply choose your Google account.
Click Accept.

A "Connection successful" message appears—click OK.

In the Google Settings dialog that reappears, click Finish.

**NOTE:** If you later change your Google Account (e-mail address), you will need to complete the Wizard steps again and Reset (reinitialize) the Link. If you only change your password, that isn't necessary.

**Step 2a - Specify your conflict preferences**

In the Conflicts dialog, set the options for handling conflicts.

Set the Link to use Amicus data when conflicts arise. (A conflict occurs if, since the last sync, a linked record has been changed in both applications or a new, matching record has been created in both...
applications.) This prevents the possible loss of information in cases where there is the possibility that other Firm Members edit the same Contacts or Appointments that you synchronize.

**Step 2b - Specify your Contacts preferences**

In the first Contacts dialog, set the main Contact options.

- **Contacts**: Choose whether to include the synchronization of Amicus Contacts and Google Contacts. While synchronizing Contacts from Google to Amicus, a duplicate check is done. If a match is found on an existing Firm Contact, you will be automatically assigned to that Contact.

- **Updates**: Choose the direction in which changes to Contacts and new Contacts are applied after initialization: from Amicus to Google, from Google to Amicus, or in both directions.

- **Deletions**: Choose the direction in which Contact deletions are applied after initialization: from Amicus to Google, from Google to Amicus, or in both directions.

- **New Contacts**: Choose whether all new Contacts created in Amicus will be automatically set for synchronization with Google. (This is the same option as provided in each Firm Member’s Preferences > People - New Entries.) This preference includes any existing or new Contacts created by other Firm Members that are newly assigned to you. Regardless of this setting, new Contacts created in your “My Contacts” Group in Google will sync to Amicus subject to your “Updates” setting above.
• **Scope:** In the second Contacts dialog, indicate which Contacts are synchronized.

**TIP:** Use the My Inactive Contacts filter to quickly identify any that should be excluded.

• **Synchronizing Firm Members to Google:** Indicate whether to include Firm Members when synchronizing Amicus Contacts to Google. The synchronization of Firm Members is one way—from Amicus to Google. Firm Members cannot be added to or edited in Amicus via the Link. Former Firm Members are not synchronized.

**Step 2c - Specify your Appointments preferences**

In the Appointments dialog, set the main Appointments options.
- **Appointments**: Choose whether to include the synchronization of selected Appointments.
- **Calendar**: Select which My Calendar in Google to synchronize with: your primary Google Calendar or another one. For example, you might have created a separate Calendar (e.g. “Business”) for synchronization with Amicus, and leave your primary Google Calendar for personal Appointments.
- **Scope**: Specify a cut-off date in the past in order to exclude past Appointments from synchronization during initialization. Preventing old Appointments from synchronization will shorten the initialization processing time. This option affects synchronization in either direction. Upon initialization, only Appointments from the specified date forward will be flagged in Amicus for synchronization. After initialization, changing the cut-off date on this page will have no effect.
- **Updates**: Choose the direction in which changes to Appointments and new Appointments are applied after initialization: from Amicus to Google, from Google to Amicus, or in both directions.
- **Deletions**: Choose the direction in which Appointment deletions are applied after initialization: from Amicus to Google, from Google to Amicus, or in both directions.
- **New Appointments**: Choose whether all new Appointments created in Amicus after initialization will be automatically set for synchronization with Google. (This is the same option as provided in each Firm Member’s Preferences > Events - New Entries.) This preference includes any existing or new Appointments created by other Firm Members that are newly assigned to you. Regardless of this setting, new Appointments created in Google will sync to Amicus subject to your “Updates” setting above.

When you have completed the Step 2 dialogs, click Finish and proceed to Step 3.

**Step 3 - Field matching and mapping criteria**

This step provides information about record match criteria and field matching.

![Field Mapping - Contacts](image)

<table>
<thead>
<tr>
<th>Amicus</th>
<th>Google</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Middle Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last Name</td>
</tr>
<tr>
<td>Prefix</td>
<td>Prefix</td>
</tr>
<tr>
<td>Title</td>
<td>Title</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
</tr>
<tr>
<td>Position</td>
<td>Job Title</td>
</tr>
<tr>
<td>Addresses*</td>
<td>Addresses</td>
</tr>
<tr>
<td>Communications*</td>
<td>Communications</td>
</tr>
</tbody>
</table>

*Note: Addresses and Communications are exchanged based on type and label name match.*

When you have reviewed the Step 3 dialogs, click Finish. You are now ready to proceed to the next step.
Initializing the Link

Before initializing the Link, you must first configure and enable the Link, from the Links > Calendar & Contacts Integrations view of the Preferences dialog in Amicus.

To initialize the Link, first click Configure in the Calendar & Contacts Integrations view. The Welcome dialog of the wizard appears.

Steps 1, 2, and 3 must be completed sequentially prior to initialization being available. The current completion status of each step is shown at the right.

Click Step 4. The Initialization Checklist dialog appears. Select the corresponding checkboxes to confirm that you have completed all appropriate steps:

- Review the Amicus-Google Link Guide
- Set your Link preferences.
- Advise your Amicus Administrator that you are ready for Google initialization.
- Receive confirmation from your Amicus Administrator that you may begin the process.
Choose which direction to initialize in: from Amicus to Google or vice versa.

NOTE: Initialization may be lengthy depending on the number of records created and synchronized. We recommend that you avoid running initialization during the period when Firm Daily Checks occur, which is shortly after midnight.

Click Begin Initialization. Both dialogs will close and you may continue to work within Amicus while the process is running.

When initialization completes, Amicus will advise you by Sticky and automatically enable the Link.

Check the Google Link Log (from Tools > Google > Show Log) for any errors. Reasons may include a failed Internet connection, unsupported characters, duplicate matches found, etc.
Using the Link after initialization

Now that you have set your preferences and performed an initialization, it is important to understand when and how synchronizations occur.

Synchronizing information

The following apply only if your preferences are set accordingly:

- **To trigger synchronizations from Google to Amicus**, you can choose Google > Synchronize Now from the Tools menu in Amicus. (There is an automatic sync every 15 minutes, but you might not want to wait.)

  TIP: If your Link is set to synchronize from Google to Amicus, we recommend that a sync be done at least monthly, to ensure that all your Google changes will be processed. Google maintains a history of your changes for only 30 days. If you have not processed these changes through the Link, they will not be reflected in Amicus.

- **A synchronization of individual Amicus items** occurs automatically whenever you add, change, or delete your flagged Contacts or Appointments in Amicus.

- **Working in another Amicus Office**: Another Firm Member working in your Amicus Office can trigger a sync with your Google account by using the Synchronize Now function. Any changes they make your flagged Contacts or Appointments will also be synchronized.

Flagging individual Amicus Contacts & Appointments for synchronization

To enable or disable the synchronization of an Amicus Contact or Appointment, select or clear its Google checkbox:

- **People**—Google checkbox is in the People Index.
• **Appointments**—Google checkbox is in the Appointment Details Dialog.

Only the Amicus items selected to sync with Google will be synchronized.

### Preference settings for new items

To have the new Contacts or Appointments you create in Amicus automatically flagged for synchronization, set the appropriate preference. (These settings are the same as those in the Link wizard.)

• **People**—see Preferences > People - New Entries
• **Appointments**—see Preferences > Calendar - New Entries

These preferences also apply to any existing or new Contacts or Appointments created by other Firm Members that are *newly assigned* to you. However, if a Firm Member assigns a new Contact or Appointment to you, it will only synchronize to your Google account upon your next explicit sync via the **Tools > Google > Synchronize Now** command in Amicus.

### Changing your Link configuration

After initialization, you can still edit your Link configuration if necessary. However, some changes will require you to reset the Link and perform a full initialization.

- If you change your Google account e-mail address or password, you must retest the connection, complete the Wizard steps again, and Reset (reinitialize) the Link.
  
  Note that if you change to a different account and you synchronize Appointments, ensure that your Google Calendar selection is set appropriately before you Reset and reinitialize.

- If synchronizing Appointments, if you change your Google Calendar selection, and you synchronize Appointments, you must Reset the Link and reinitialize.

- If you enable the synchronization of one type of record (Contacts or Appointments) that was previously disabled, those records will initialize automatically when you next do a **Tools > Google > Synchronize Now**.

- If you disable the synchronization of one type of record (Contacts or Appointments) that was previously enabled, those records will no longer synchronize.

### Disabling the Link

You can temporarily disable or re-enable the entire Link at any point after initialization by clearing or selecting the Enable option on this dialog. Note that switching the Contacts & Calendar Integration preference to None or Outlook will disable the Google Link.

You cannot enable both the Google Link and the Outlook Contacts & Calendar Link at the same time, and switching between the Outlook and Google Links on a regular basis is not recommended. This will avoid data conflicts.
Synchronization details

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

Match criteria

The Contacts and Appointments being compared and synchronized between the two programs are, where matches are found, linked together using unique identifiers. These links are stored internally in the Amicus database, so that subsequent syncs can be performed quickly and efficiently—only new records in either database are then checked using the matching criteria.

Eligible records that meet the scope requirements are matched based on the key identifiers in each record. This matching is not case sensitive.

- **If a match is not found**, the Link will create a new record, so that there are corresponding records in both databases.
- **If one match is found**, either the Amicus record or Google record is updated. Where a record has been changed in both applications, conflicts are resolved based on the Link priority options set in the Link Wizard.
- **If more than one match is found**, an error is logged. This log is accessible in Amicus from Tools > Google > Error Log.

Contact matching

The following match criteria are used, based on whether the Contacts are considered to be companies or individuals:

- **Companies**: A Google Contact is considered to be a Company if it has only a Company Name—its First Name and Last Name are blank. An Amicus Contact is explicitly designated as a Company Contact (and lacks a First or Last Name).
  
  For the Contacts to match, the Company Name in each record must match.

- **Individuals**: A Contact is considered to be an Individual if it has a First and/or Last Name.
  
  - If one Contact has both First and Last Names, the other Contact must have matching First and Last Names.
  
  - If one Contact has only a First Name, the other Contact must have only a First Name and that Name must match.

  If both Individual Contacts also have a Company Name, that Name must match as well.

  If there is a match on First and Last Names and one Contact lacks a Company Name, that will be considered a match.

- **Address, Phone, Fax, E-mail matching communication information for Contacts is based on label match.**

Appointment matching

Appointments are matched based on Title, Start Date, and Start Time.

**TIP**: Avoid using identical Titles for Appointments that start at the same date and time.
## Contact synchronizations

<table>
<thead>
<tr>
<th>Amicus Contact Fields</th>
<th>Google Contact Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Middle Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last Name</td>
</tr>
<tr>
<td>Prefix</td>
<td>Prefix</td>
</tr>
<tr>
<td>Suffix</td>
<td>Suffix</td>
</tr>
<tr>
<td>Company Name</td>
<td>Company</td>
</tr>
<tr>
<td></td>
<td><em>From Google to Amicus, the Amicus Company Name is updated only if it is not a linked field in the Amicus Contact.</em></td>
</tr>
<tr>
<td>Position</td>
<td>Job Title</td>
</tr>
<tr>
<td>Addresses</td>
<td>Addresses</td>
</tr>
<tr>
<td><em>Matched as per label</em></td>
<td><em>Matched as per label</em></td>
</tr>
<tr>
<td>Phone Numbers</td>
<td>Phone Numbers</td>
</tr>
<tr>
<td><em>Matched as per label</em></td>
<td><em>Matched as per label</em></td>
</tr>
<tr>
<td>Fax Numbers</td>
<td>&quot;Fax&quot; Phone Numbers</td>
</tr>
<tr>
<td><em>Matched as per label</em></td>
<td><em>Matched as per label</em></td>
</tr>
<tr>
<td>Web Addresses</td>
<td>URLs</td>
</tr>
<tr>
<td><em>Matched as per label</em></td>
<td><em>Matched as per label</em></td>
</tr>
<tr>
<td>Email Addresses</td>
<td>Email Addresses</td>
</tr>
<tr>
<td><em>Matched as per label</em></td>
<td><em>Matched as per label</em></td>
</tr>
</tbody>
</table>

**NOTE:** If no matching communication Label is found in Google, it is added as a Custom Label. If this occurs in Amicus, the communication record is not synchronized.

**Amicus linked address/communications:** If an Amicus Individual’s Address, Phone, Fax, Web Address, or Email field is linked to the corresponding field in a Company record, then information will not be updated in Amicus from Google.

**Google duplicate communications labels:** If a Google Contact has multiple fields with the same Label (e.g. two “Work” Phone Numbers), an error is logged and the Contact information is not synchronized in either direction.

**If your assignment on an Amicus Contact is removed:** This is processed as a deletion by the sync to Google.

**If you move a Google Contact from the “My Contacts” Group to another Group:** The next sync will clear the Google sync flag in the Amicus Contact so that it will be ignored in subsequent syncs.

**Google maintains a change history for only 30 days:** A Google Contact addition, change, or deletion is synchronized with Amicus only if you sync that record within 30 days.
### Appointment synchronizations

<table>
<thead>
<tr>
<th>Amicus Appointment Fields</th>
<th>Google Appointment Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Title</td>
</tr>
<tr>
<td>(Start) Date and Time</td>
<td>(Start) Date and Time</td>
</tr>
<tr>
<td>To (Date and Time)</td>
<td>(End) Date and Time</td>
</tr>
<tr>
<td>All Day</td>
<td>All Day</td>
</tr>
<tr>
<td>Location</td>
<td>Where</td>
</tr>
<tr>
<td>Main Note</td>
<td>Description</td>
</tr>
<tr>
<td>Repeat type and pattern</td>
<td>Repeat type and pattern</td>
</tr>
<tr>
<td>File associations <em>(for details, see below)</em></td>
<td>Description <em>(text at the beginning of the field)</em> <em>(for details, see below)</em></td>
</tr>
</tbody>
</table>

**Amicus Personal Appointments**: Appointments that have no associated Files are synchronized in the same way as other Appointments.

**Amicus Red Letter Day Events**: These are not synchronized to Google.

**CompuLaw Appointments**: If you have Appointments created in Amicus by the CompuLaw Link, note that they can be synchronized to Google but any changes to them made subsequently in Google will not be synchronized to Amicus.

**If your assignment on an Amicus Appointment is removed**: This is processed as a deletion of the Appointment by Google.

**Google maintains a change history for only 30 days**: A Google Appointment addition, change, or deletion is synchronized with Amicus only if you sync that record within 30 days.

### Adjourned and current instances of Amicus Appointments

To take full advantage of the Show Adjournments feature, reschedule Appointments in Amicus rather than in Google.

When changes are made in Amicus to an Appointment flagged to track adjournments:

- If the current instance is rescheduled in Amicus, both the current and adjourned instances will be synchronized to Google as appropriate.

- Any deletions of adjourned instances made in Amicus will be synchronized to Google as appropriate. Adjourned instances in Google, like in Amicus, show “[Adjourned to Date]” at the beginning of the subject.

When changes are made in Google:

- If the current instance of an Appointment flagged to track adjournments is rescheduled in Google and then synchronized to Amicus, adjourned and current instances will appear in Amicus as expected. The Adjournment Details will list this rescheduling with the reason “Unknown – Date Changed in Google”. You can edit the Details in Amicus and change the reason. The adjourned instance will synchronize back to Google, and show “[Adjourned to Date]” at the beginning of the subject.
- In order to ensure proper tracking, any changes or deletions of *adjourned* instances made in Google will not be synchronized to Amicus. Similarly, deletions of *current* instances will not be synchronized to Amicus. (These will be noted in the Google Link Log.)

- If you have made changes to *adjourned* instances in Google, resetting the Link will cause those changes to be overwritten (because the reset synchronize is done first from Amicus to Google).

### Repeat patterns

Some repeat patterns do not match between Google and Amicus, and so should be avoided when possible. Note the following exceptions and clarifications:

- **Yearly:** If a Google Appointment is set to repeat every 2 or more years, an error is logged and the Appointment information is not synchronized in either direction.

- **Quarterly:** If an Amicus Appointment is set to repeat quarterly, the Google pattern will be set to repeat Monthly every 3 months, and vice versa. If the repeat date does not occur in a particular month (e.g. the 31st of November), Google will simply skip that instance of the Appointment.

- **If date falls on a weekend or holiday:** The “Move To Next Business Day” and “Move To Previous Business Day” options in Amicus are not supported in Google. If synchronizing an Amicus Appointment with Google, always set its “Schedule It Anyway” rule—using the “Move To Next Business Day” or “Move To Previous Business Day” options would result in duplicates and incorrect scheduling. When a new Google Appointment is synchronized to Amicus, the Appointment created in Amicus will have this field set to “Schedule it anyway”.

- **Up To number of occurrences:** If an Amicus Appointment is scheduled on a date that does not occur every month (e.g. 31st) with an Up To number of occurrences is synchronized, the Google Appointment will simply skip those occurrences and not count them. In contrast, Amicus automatically schedules those occurrences for the last day of the month.

- **Yearly on Last [day of the week]:** If an Amicus Appointment is set to repeat Yearly on the Last Tuesday of the month, the Google Appointment will be set to repeat on the Start Date.

- **Start Date:** TIP—when creating a Repeating Appointment in Google, go to the date of its first occurrence and create it from there.

- **All Day:** If a Google All Day Appointment is set to repeat, it will not be synchronized to Amicus. TIP: Create All Day Appointments in Amicus rather than in Google.

### File Associations in Appointments

**Amicus to Google:** Because there is no equivalent to Amicus Files in Google, Appointments sent from Amicus to Google will assign the File Name of the associated File, if applicable, to the beginning of the Description field of Google Appointments—for example, “File: Brown v. Browne”.

**Google to Amicus:** The Link extends your ability to make File associations while working in Google. You can enter the File Name in the Description field of any Appointment, in order to create an association with that File in Amicus, provided that you have entered the information in the proper format and a match is found in Amicus. The proper format is shown in the following example:

File: Smith v. Jones

The File statement must appear at the very beginning of the Description field. If specifying multiple Files, enter a line break between each statement. The information is not case sensitive. A space is required between the “File:” and the File Name.
If a matching File Name is found in Amicus, the association is established and the File Name is removed from the Notes field in Amicus. Otherwise, an error is logged and the File Name is left in the Amicus Notes field so that you can follow up as appropriate.

**Firm Member assignments**

Your preference settings for default Firm Member assignments on new Appointments and Contacts are not applied. Only you are automatically assigned to new records created in Amicus by the Link.
Troubleshooting

Google Link Log

To view a history of your Link initialization and synchronization processes for the last 7 days, including any errors encountered, choose Google > Show Log on the Tools menu in Amicus at your workstation. It includes information from your automatic synchronizations, as well as those done via the Synchronize Now function. Choose whether to show the full chronology of processing steps or the list of errors encountered.

![Google Link Log](image)

Resetting the Link

If your Amicus and Google records become out of sync, discrepancies may be due to some major change that has occurred in the Amicus database or in Google. For example, such a situation may occur after restoring a backup in Amicus.

We recommend that you first try restarting both applications and try another synchronization.

If this does not correct the discrepancies, then we recommend that you reset the Link. This will clear the links between the records in the two applications, and re-initialize the Link. This can be a lengthy process.

To reset the Link, go to Preferences in you Office module. Choose Links > Contacts & Calendar Integrations. The Contacts & Calendar Integration view of the Preferences dialog appears.

Click Configure to launch the Amicus Google Link Configuration wizard. The Welcome dialog of the wizard appears.

![Amicus Google Link Configuration Wizard](image)
Click Reset. The Reset Link dialog appears.

Select the Yes option.

For convenience, the cut-off date option for limiting the scope of Appointments synchronized is provided in this dialog as well. Change the cut-off date if desired. Note that any Appointments after that date that exist in both applications will not be resynchronized at this time. (They will be resynchronized only if and when they are edited later.)

Choose the synchronization direction: from Amicus to Google or vice versa.

Click Reset Now.

**NOTE:** The Reset process may be lengthy depending on the number of records created and synchronized. We recommend that you avoid performing a Reset during the period when Firm Daily Checks occur, which is shortly after midnight.

**Other Important Information**

In addition to the following information, also see the *Amicus Product Bulletin* for other issues (including workarounds where available). That document is available in the Support > Bulletins section of our website.

- It is recommended that you open Contacts in Google by single-clicking rather than double-clicking, as the latter might cause problems that require that you log out of your Google account and back in.
- Refer to “Repeat patterns” on page 21 for a description of patterns that don’t match.
For further information, contact

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