

Amicus Attorney News

The Official Newsletter of Amicus Attorney

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2003

Volume 1
Issue 4

amicusattorney.com

1. [What's New @ Amicus Attorney?](#)

2. [You Have to Try This!](#)

Practical Tips and Tricks from Amicus Attorney Certified Consultants

3. [Legal Tips](#)

Tips from Legal Industry Experts on How to Effectively Manage Your Practice

4. [Spotlight On...](#)

Highlighting a Feature of Amicus Attorney

5. [FAQs - Frequently Asked Questions](#)

Our Customer Service Team Provides Answers to Some Common Technical Questions

6. [Amicus Attorney Premier Consultants](#)

Training, Events and More!

1. [What's New @ Amicus Attorney?](#)

Shows, shows and more shows... April has been an extremely busy month for Gavel & Gown Software Inc. attending three major and several local trade events across North America.

The ABA Techshow, presented by the Law Practice Management Section of the America Bar Association, was held April 3rd & 4th in Chicago, Illinois and was the first major stop in April for Amicus Attorney. This premier legal technology conference brought together over 2,000 lawyers and legal professionals from all across the world. Staff from Gavel & Gown and Certified Consultants were on hand to answer all Amicus Attorney inquiries.

The Association of Legal Administrators (ALA) Show attracted thousands of legal management professionals from all parts of the country to take part in the 32nd Annual Educational Conference and Exposition. The event was held at the San Diego Convention Center - April 7th - 10th, 2003 and Amicus Attorney was there. With over 300 exhibitors, this event is one of the top showcases for those looking for the latest in law office technology, products and services.

The final major show destination in April took the team to San Francisco for the Daily Journal LegalWorks Show on April 22nd & 23rd, 2003. This event attracted California area legal professionals looking for advanced CLE training and legal technology solutions. Our local Certified Consultants were happy to conduct hundreds of product demos for lawyers looking for a robust practice management solution.

2. [You Have to Try This!](#)

Practical Tips and Tricks from Amicus Attorney Certified Consultants



RAPID **R**ETRIEVE.

Did you know that Amicus Attorney Version 5.1.1 Users can automatically request medical records via Rapid Retrieve - simply and securely?

Rapid Retrieve by Mediconnect.net is the leading provider of online medical record retrieval.

Combining the powerful practice management features of Amicus Attorney with quick and easy medical record retrieval from Rapid Retrieve will allow you to convert medical record retrieval costs into billable expenses. The searches and records can be stored on your Amicus Attorney File and you can bill for every medical document retrieved.

There is no need for you or your staff to spend countless hours trying to track down hard to find medical records. Let Amicus Attorney and Rapid Retrieve handle it all for you.

For more information:

E-mail us at
info@amicusattorney.com
or call 800-472-2289

How to Jump-Start Document Management with Amicus Attorney

by Paul Mansfield

Amicus Attorney has the ability to attach documents to case files via a document management function on the file brad. When you generate any document through Amicus Attorney, you are automatically prompted to save it to the appropriate case file. Or, if you happen to be working on a document in your word processor that hasn't been associated to your File in Amicus Attorney, you can easily click the 'Attach to File' button in your Word or WordPerfect toolbar to both save the document, and to associate it with the appropriate File in Amicus Attorney.

This ensures new documents are recorded in the appropriate File in Amicus Attorney, but what about the many documents that were created prior to adopting Amicus Attorney? How do you easily and quickly add those to the file brad?

There are several ways to easily associate all of your documents with the appropriate case files from within Amicus Attorney. One of the options in the File Brad is for managing documents.

1. Open a File in Amicus Attorney, the Brad page by default should display the File Summary.
2. Click the File Summary title to display the other File options, then click Documents, All Documents. The File Brad will now display all of the documents that have been associated with this particular File.
3. Open Explorer or My Computer and navigate to where the Documents for this File are stored on your server.
4. Highlight each of the documents you wish to include. Drag-and-Drop them all to the File Brad in Amicus Attorney. (This does not remove the documents from their saved location on the server, but each one will have a unique document profile created on the File in Amicus Attorney).

This feature will handle any type of document or folder including images and movies. Each will have a document profile created automatically with the title, path, and original create date and time. You can modify any of these fields, and also add to the Document Summary and fill in the Author's name.

Another option is to create a single document profile that links to the folder that contains all of the documents for a particular file. This method is useful if you have some users who fail to save their documents to the appropriate file in Amicus Attorney.

1. Create a new document profile for a file. For it's title enter "Home Folder"
2. For document date, use 1/1/1990 --- this will force this profile to sort to the top of the list.

Current Amicus Attorney Version 5.1.1 users can download the MediConnect Practice Pack from the Amicus Attorney web site to incorporate the MediConnect content into their Amicus Attorney.

[Click here](#) to download the Practice Pack.

For a **FREE DEMONSTRATION** of Rapid Retrieve, [click here](#).

[Click here](#) for more details on how Rapid Retrieve works seamlessly with Amicus Attorney.

Legal Laugh

Your monthly dose of humor...

Pass It On!

Please feel free to pass this eNewsletter on to others who would be interested in receiving it.

SUBSCRIBE HERE

By simply clicking on the "Subscribe Here" button, they will also start receiving it in their inboxes on a monthly basis.

3. For location, click on the radio button for Folder and then browse to the client/matter folder on your server for this file.

4. When you click on this entry to "view" the document, instead you'll get an Explorer type display of this client's home folder, with all sub-folders displayed too.

5. As you access individual documents for this file, use the "Save to Brad" macro to add the document in detail to the Amicus Attorney Brad profile list.

SUGGESTIONS

Have suggestions for the eNewsletter?
We want to hear them!

E-mail us at:

amicusnews@amicusattorney.com

Missed An Issue?

For past issues of Amicus Attorney News - [click here](#).

This approach gives you instant access to client files without the time consuming process of adding all legacy documents during your Amicus Attorney startup phase.

Caveat: this assumes you have a server-based and client-centric filing system for documents. If you don't, this approach won't work.

Compliments of:

Paul Mansfield

Paul Mansfield Consulting

Corrales, NM

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www.paulconsults.com

Since the 1980s Paul Mansfield Consulting has been at the forefront of the information systems technology field, bringing innovative automation solutions to law offices, law departments, courts, and government agencies throughout the United States, Central America, the Far East, and Eastern Europe. Paul Mansfield is an Amicus Attorney Premier Consultant and his services range from automation planning, to system implementation / integration for both front and back office systems. Mr. Mansfield's areas of expertise include financial / time & billing, litigation support, decision support (docketing and conflict avoidance), document management, expert system document assembly, collaborative GroupWare, and work-product retrieval.

YOUR LEGAL LAUGH

Your monthly dose of humor...

PAYING THEIR RESPECTS

An elderly man of 82 was told that he had a serious medical condition and didn't have long to live. So he summoned the three most important people in his life to give them some final instructions on what he wanted done after his death.

He summoned:

He summoned:

1. His Doctor
2. His Priest
3. His Lawyer

The man told them: " Well today I found out I don't have long to live. So I asked you three here, because you are the most important people in my life. And I need to ask a favor. Today I am going to give each of you an envelope with \$50,000 dollars in it. When I die, I would ask that all three of you throw the money in my grave."

Well a few days later the old man passed on. The doctor said, "I have to admit I kept \$10,000 dollars of his money, he owed me lots of medical bills. But I threw the other \$35,000 in." (This being another fine example of medical mathematics.)

The Priest said, "I have to admit also I kept \$25,000 dollars for the church. It's all going to a good cause. And I threw the rest in."

Well the Lawyer just couldn't believe what he was hearing, and said "I am surprised at you two. I wrote a check for the whole amount and threw it in."

Compliments of: The Comedy Zone - www.comedy-zone.net.



Legal Tips

Tips from Legal Industry Experts on How to Effectively Manage Your Practice



These Win/Win Tips Will Keep Your Firm's Cash Flowing

By Edward Poll, J.D., M.B.A., CMC

Two tasks that are fundamental for law firm executive director/administrator success: managing people and managing money. Managing people fosters harmony and efficiency within the organization.

Managing money keeps the office operating and keeps the people paid.

Cash flow (or lack thereof) in most law firms acts as a barometer. And, in competitive times, cash-flow management is not only an art, it is an essential for the very survival of the firm. A cash-flow problem is, in many cases, only the result of a long chain of events that administrators can prevent with appropriate foresight.

What follows are some business practices that administrators - and the lawyers they work for - can adopt to stay out of serious cash-flow trouble.

- **Write a business plan.**

In order to delineate your goals, you must have a business plan. If you already have a plan, review and update it. This plan is an important step towards your future growth. The business plan sets the path for attaining firm objectives. Think of it this way: You want to travel by car from Los Angeles to Denver. You look at the map and see many alternative routes. The map is your guide and it will help you find the most direct and efficient path. That is what a business plan does for your firm.

- **Develop a cash-flow statement.**

The cash-flow statement can have many names: a cash-flow budget, a statement of cash or a forecast. Whatever the moniker, this statement is important for review on at least a weekly, if not daily, basis. It is

the single most important tool for the success of any business activity.

- **Increase your hourly rate.**

If your firm increases its billing rate a little at a time, you won't shock your clients with a big adjustment. You can raise rates until you are at least at the "market" level - the rate your competitors charge.

- **Consider flat-fee billing as opposed to hourly billing.**

With flat-fee billing, you can deposit the entire fee into the general account upon receipt.

- **Change your billing cycle.**

Bill one-fourth of the alphabet each week. In this manner, you will receive money from clients on a regular basis - probably weekly, rather than once per month.

- **Shorten your billing cycle.**

If you remain on a monthly billing cycle, be sure your clients receive statements on or before the first day of the following month. To do this, your billing cycle must end on or about the 25th of the month. The theory is that most people pay their bills on or about the first of the month. If a statement reaches the client after this time, the statement is normally placed in the pile of bills to be paid the following cycle. That means a delay for payment for as much as 75 days: the first 30 days you are doing the work; the second 30 days is the missed payment cycle; then it takes at least 15 days for the client to make out the check, mail, and for the mail to deliver the check to you. If the client delays payment even further, the time extends beyond 75 days. Thus, anything you can do to shorten the cycle will be that much better for you.

- **Send statements after a particularly beneficial psychological event.**

If you bill when clients are happy -even if somewhat before or beyond the normal billing date -- they're more likely to pay quickly. For example, after you have won a motion in court, prepared a draft of an important contract with which your client is pleased, or closed the negotiation on a deal that favors your client, send a billing of services rendered to date.

This will place the client on the peak of the "client satisfaction curve," the time of least resistance for payment of fees. Later, the client will invariably forget how important you were in the process of the result and wonder why the bill is so high. Once in that state of mind, the statement for services will sit unpaid until some future date.

- **"Age" your accounts receivable once a week.**

An aging is an important piece of information in the management of your practice. Do not ignore clients who do not pay in accordance with their agreement. Time passes quickly when you are busily engaged in practicing law and advocating clients' interests. You tend to forget that one client owes you money while you are working on other clients' matters.

Forgetting or ignoring "old" clients, results in forgetting or ignoring the accounts receivable. This results in the failure to collect your money. Thus, it is important to be reminded frequently. On the one hand, you will be able to pursue collection with the regular, weekly reminders that money is owed to you. On the other hand, you will be able to thank a client you talk to who has recently sent in payment on account. Such courtesies go a long way to maintaining good client relations.

- **Stop work!**

If, based on the aging information, you are aware that a client is delinquent in the payment of fees, stop further work for that client. Go to the beach, spend more time with the family, expand your marketing efforts for new clients. Under no circumstances, should you do any further work for the client.

Before stopping work, however, be sure the client knows that you will do no further work until payment is made. If the matter involves litigation, make the appropriate motion before the court to be relieved. Not only

will you most likely be paid, but you will also see a better attitude in your client toward your efforts on his or her behalf. The client will know that you are serious, that you protect your own interests, and, therefore, will do all in your power to protect the interests of your client.

- **Hire someone to help collect.**

If you are having little success collecting your accounts receivable, or if you believe that the working attorney or administrator (you) should not be the person collecting the bills, then hire someone (e.g., a part-time accounts-receivable clerk from a local college or a retired bookkeeper) to do only this task. The cost of the person will be less than the money received.

- **Maintain a high average daily balance.**

Most banks calculate the "average daily balance" in your bank account. This is one of the most significant bits of information with which a bank works in analyzing a loan request. Thus, you want to maintain as high a balance as possible. This can be done either by keeping a large sum of money in the bank or by keeping limited funds in the account for a longer period of time.

You can keep funds in the account longer by depositing revenue immediately upon receipt and spreading the payment of bills throughout the month. Do not pay your bills all at one time: This will cause an exaggerated dip in your account balance rather than provide an even flow of funds.

- **Don't wait to deposit checks.**

It's the first rule of cash flow management: Do not accumulate checks for deposit until the end of the week. While the check is "cooling its heels" in your desk drawer, too many catastrophic events might occur. The client may, in the interim, become angry, for whatever reason, and stop payment on the check. The check may reach your client's bank at a time when the account is overdrawn. The client may have been named as a defendant in a lawsuit for which attachment procedures are available. Because of this, the client's bank account may be "marked" for a sum large enough to cause the presentation of the check you are holding to be rejected.

In each of these cases, and many others that you can imagine, had the check been deposited immediately upon receipt, the check most probably would have cleared the client's bank and credited to your account.

- **Be sure that you sign all checks.**

Do not delegate this authority. You must know the present status of your "business" at all times.

- **Consider an automatic bank sweep.**

Banks provide for an "automatic sweep" on a daily basis. Establish a minimum amount of money, such as \$2,500, to remain in your general account. The exact sum depends on the amount of checks and deposits that pass through your bank account each month. Then, instruct the bank to segregate all funds in excess of this amount at the end of each day and "sweep" or transfer those "excess" funds into a money market (interest bearing) account until needed.

Likewise, the bank can be instructed to automatically transfer funds into the general account from the money market account in the event the balance goes below the established minimum amount.

The better approach, however, is to request the bank to call you on any day during which the balance of your account goes below the minimum amount established by you. This latter approach, as contrasted with the automatic sweep into the money market account, forces the one responsible for these activities to know rather than guess the status of the cash balances at every given moment.

- **Make bank deposits personally until you get to know the bank personnel.**

Get to know the branch manager where you bank. Know the loan committee personnel. Know the operations personnel. These are the people who can help you the most when you have a need at the bank.

Only when you are on good terms with the bank personnel should you bank by mail or allow someone else in your office to make deposits.

- **Negotiate immediate access to deposits.**

Some banks place a "hold" on funds deposited with them until the funds have cleared through the banking system. This may be as long as seven days. However, you can negotiate with the bank so that you have immediate access to your deposited funds.

- **Use remittance envelopes.**

Pre-addressed and stamped return envelopes mailed with your statements will help. This saves clients time and effort in mailing your payments and, frequently, saves at least one day in your receiving payments.

- **Deposit all checks from clients**

Deposit all checks - even if the amount received does not match the amount due per the statement. Make a photocopy of the check. After making the deposit, call the client. After you have played "telephone tag" for several days, ask the client to explain the difference. You will ultimately reconcile the amount paid with the amount due; however, in the meantime, you will have deposited the amount sent to you and continue to receive the benefits of that deposit.

- **Charge for the time of paralegals and legal assistants.**

The American Bar Association defines legal assistants this way: "...a person, qualified through education, training, or work experience, who is employed or retained by a lawyer, law office, governmental agency, or other entity in a capacity of function which involves the performance, under the ultimate direction and supervision of an attorney, or specifically delegated substantive legal work, which work, for the most part, requires a sufficient knowledge of legal concepts that, absent such assistant, the attorney would perform the task." The charge is not for secretarial work, but for creative, legal work such as meeting with clients, meeting with court personnel, deposition summaries, drafting pleadings, contracts, investigations and generally assuring that deadlines are set and met.

- **Know when to say no.**

Lawyers get into financial and other difficulties with clients in two common situations:

a. They take on a client that has already used two or three other attorneys on the same matter. There is a reason why the first two lawyers are no longer around, and that reason usually is that the client's expectations far exceeded the reality of the probable result.

b. The client refuses to take your advice, and you do not believe the suggested course of conduct is appropriate or that it will be successful. In either case, it's time to fire the client. Of course, place the "no" or "firing" in writing and then withdraw. You will save yourself lost fees, heartache and - most importantly - time that would have otherwise been expended without real hope of being compensated.

c. Remind your attorneys that the law is a profession. Even though your firm is a professional organization, it is also a business. You are running an organization that must act in a business-like manner. Law firm administrators and managers are ultimately responsible, along with the management committee of the firm, for efficient firm operations. You must take those steps and preventive measures appropriate to accomplish this goal. And, coincidentally, these efforts usually result in the more effective delivery of legal services by the firm.

- Edward Poll

Compliments of:

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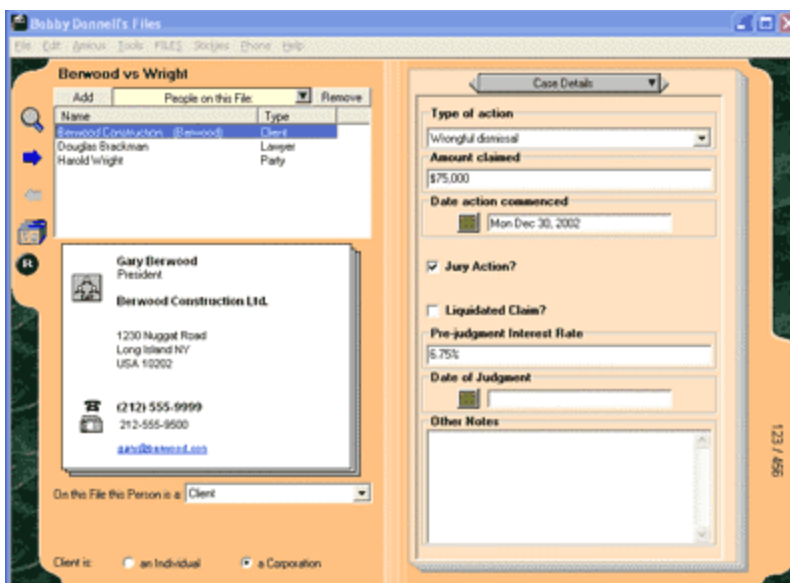
About the Author: Edward Poll, J.D., M.B.A., CMC, is a coach to lawyers and certified management consultant who shows attorneys and law firms how to be more profitable. Ed's latest book is Collecting Your Fee: Getting Paid From Intake to Invoice (ABA 2003); he is the author of Attorney & Law Firm Guide to The Business of Law, 2d ed. (ABA 2002); Secrets of the Business of Law: Successful Practices for Increasing Your Profits. To make suggestions or comments about this article, call (800) 837-5880 or send an e-mail to edpoll@lawbiz.com. You can also order a free e-zine or visit Ed on the web at www.lawbiz.com.



Spotlight On...

Highlighting a Feature of Amicus Attorney





zoom

5. [FAQs - Frequently Asked Questions](#)

Our Customer Service Team Provides Answers to Some Common Technical Questions



Missing, Corrupt or Invalid Team License Data File

Cause:

The Administrator was licensed while the team member was offline.

Solution:

In the Administrator go to the User menu > User Management > User Status. Then highlight the user and select the User menu again. Then select Recovery Functions, and Reset User Status. This should then change the User Status to be online rather than offline.

NOTE: Any changes made by the user while offline will be lost when performing the above procedure because the Team database would not have correctly synchronized with the User's local database.

6. [Amicus Attorney Premier Consultants](#)

Training, Events and More!



Amicus Attorney Premier Consultants are professionals who are nationally qualified to sell and install all Amicus Attorney products and to provide their customers with on-site training and support.

Training Programs Offered by our Premier Consultants:

Here are some of the training sessions being offered by some of our Premier Consultants this spring.

For more information or to register for a class, please contact the consultant firm directly.
All times listed in EST unless otherwise indicated.

CLASSROOM TRAINING:

InTouch Business Consultants

Seminole, FL
(727) 319-8281
www.intouchbc.com

For more details, visit their [web site](#).

Date	Time	Training Session	Location
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May 22nd, 2003	Session 2 - 1:30 pm	Amicus Assembly - "Advanced Assembly Features - Lists & Queries"	Morganville, NJ
June 5th, 2003	Session 1 - 9:00 am	Amicus Attorney "What's New in Version 5.1.1" and "Most Useful Features"	Morganville, NJ
June 5th, 2003	Session 2 - 1:30 pm	Amicus Attorney "Administrator Training v5.1.1 Customization and Backup Options"	Morganville, NJ
June 12th, 2003	Session 1 - 9:00 am	Amicus Attorney "What's New in Version 5.1.1" and "Most Useful Features"	Morganville, NJ
June 12th, 2003	Session 2 - 1:30 pm	Amicus Attorney "Administrator Training v5.1.1 Customization and Backup Options"	Morganville, NJ
June 26th, 2003	Session 1 - 9:00 am	Amicus Assembly - "Possibilities of Document Management - Creating Templates"	Morganville, NJ
June 26th, 2003	Session 2 - 1:30 pm	Amicus Assembly - "Advanced Assembly Features - Lists & Queries"	Morganville, NJ

ONLINE & CD-ROM TRAINING PROGRAMS:

CD-ROM TRAINING

2b1 Inc.

San Francisco, CA
(415) 284-2221
www.2b1inc.com

For more details, visit their [web site](#).

Amicus Attorney V Basic Training on CD-ROM
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eCLASS TRAINING

ProBill Law Firm Solutions

Boca Raton, FL
(800) 299-9177
www.probill.net

For more details, visit their [web site](#).

Date	Time	Training Session	Location
Flexible Dates	9:00 am 11:00 am 1:00 pm 3:00 pm or 5:00pm Weekend and late nights available.	eClass Training (Web Based training) - <i>choose from:</i> Basic Application Training Advanced Application Training Application Troubleshooting Quick Start (New Clients Only)	Web based - You can take classes directly from your own computer.

EVENTS:

You can also visit our Premier Consultants at these events across the country...

MAY 2003

Date	Event	Location	Consultant Firm
May 9th & 10th, 2003	Georgia Trial Lawyer's Association Annual Convention www.gtla.org	Swisshotel Atlanta, GA	Best Law Firm Solutions www.bestlawfirm.com
May 13th, 2003	LegalTech Los Angeles Case Management Shootout 2:00 - 3:30 p.m. PST	Westin Bonaventure Hotel Los Angeles, CA	Presenter: Kent Davis Law Firm Technology Specialists www.tech4law.com

	www.legaltechshow.com		
May 14th -16th, 2003	New Jersey State Bar Association - Annual Meeting www.njsba.com	Bally's Park Place Atlantic City, NJ	TQS Solutions www.TQSSolutions.com

JUNE 2003

Date	Event	Location	Consultant Firm
June 8th - 13th, 2003	Louisiana State Bar Association Summer School and Annual Meeting www.lsba.org	Destin, FL	Northshore Technology Center www.northshoretechnology.com

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