Amicus Attorney News

The Official Newsletter of Amicus Attorney

April 2004
Volume 2
Issue 4

1. Association of Legal Administrators

33rd Annual Educational Conference & Exposition

Association of Legal Administrators (ALA)
33rd Annual Educational Conference and Exposition
May 17-20, 2004
Pennsylvania Convention Center
Philadelphia, PA

Amicus Attorney will be at the ALA's 33rd Annual Conference and Exposition and will be exhibiting from booth #841. The event features nationally renowned speakers, and attendees can take part in pre-conference workshops, a variety of educational sessions, a silent auction and several social activities.

The exhibit hall will have more than 300 vendors showcasing the latest in law office technology, products and services and will be open as follows:

- Monday May 17th from 9:30am – 4:30pm
- Tuesday May 18th from 9:30am – 11:45 am and 4:45 – 6:15pm
- Wednesday May 19th from 9:30am – 2:00pm

This year's event promises to be the best ever with over 1,500 attendees expected.

For more information or to register to attend, please visit – http://www.alanet.org/conf

Don't forget to stop by and see us in booth #841!

amicusattorney.com

Association of Legal Administrators (ALA)
33rd Annual Conference & Exposition
May 17-20, 2004
Philadelphia, PA
Amicus Attorney will be in Booth #841._

...access your practice information - anytime, anywhere.

Amicus Attorney V Basic Training (ABVT) on CD-ROM

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Click here to order.

Legal Laugh

Your monthly dose of humor...

2. Spotlight On ...

Highlighting a Feature of Amicus Attorney

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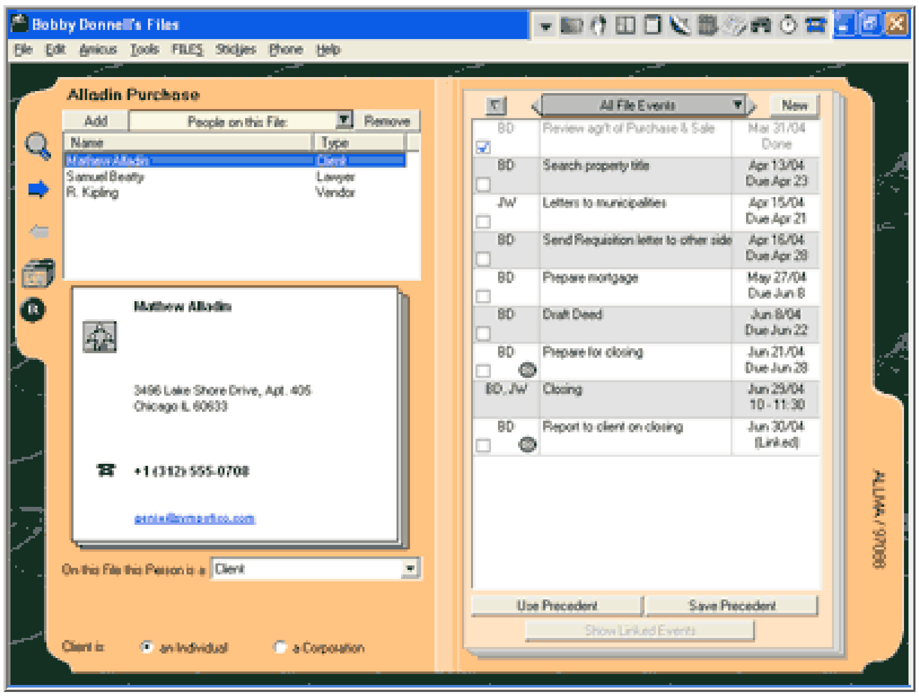
Creating Precedents

To help save you time, Amicus Attorney gives you the ability to save a series of steps as a precedent for reuse in the future. Similar types of cases follow similar procedures so why repeat steps you have already taken when you can use precedents?

All of the appointments and to-dos involved in a transaction are included in a saved precedent. You can then use the saved precedent in another file that involves a similar series of steps.

Your efficiency will increase with the use of precedents as you can reuse your work wherever possible. You can start off with simple precedents and then build on them gradually.



Once you have built up a list of the events in a completed transaction, you can create a precedent.

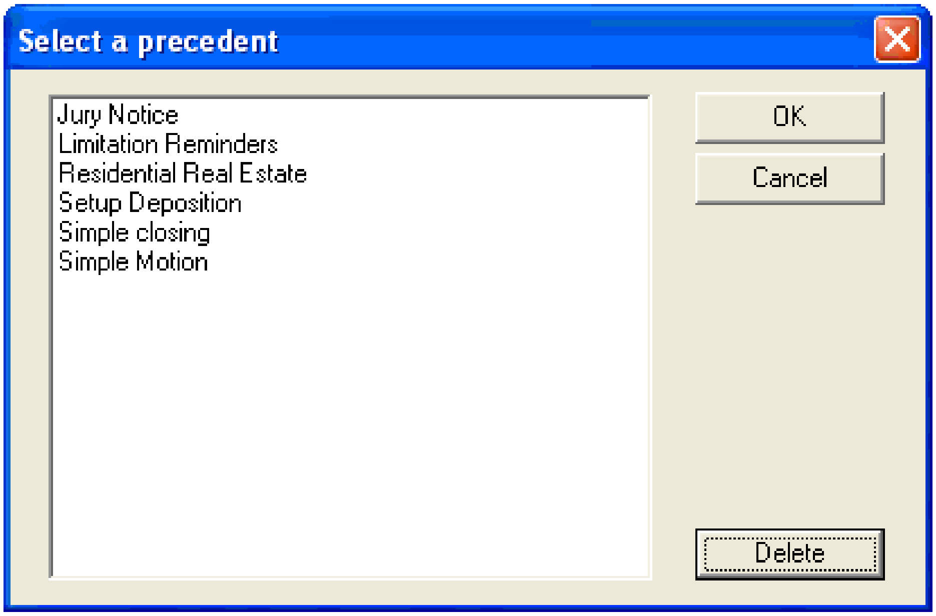
- Simply review the list on the All Events page on a file's brad and decide which appointments and to-dos to include in the precedent. (if you are a team member choose "All File Events")
- Select the events you want to include by clicking on them in the list.
  - You can select events that are contiguous in the list by holding down the Shift key as you select the first and last event. Everything in the middle will then become selected.
  - You can select events that are non-contiguous by holding down the control key as you click the events. This will only select those events you directly click on.

    Note: If any of the events you select are linked, the links will be preserved. You can also select tasks that have been marked as done.
- Click Save Precedent button on the bottom right hand corner of the file detail.
- You will then be prompted to "name the new precedent."
- If you are a team member, you can keep the original team member assignments (the same team members will be assigned to the same events) by clicking the checkbox – "Keep original team member assignments." If you do not select this option, all events will be entered into your name, and then you can reassign them to whomever you choose.

- Click OK. The precedent is saved.

Using a Precedent:

- Open the file in which you want to use the saved precedent. In the File detail (upper right hand corner) choose Events – then All Events. If you are a team member – choose Events – All File Events.
- Click the "Use Precedent" button in the lower right hand corner of the file detail. A list of your saved precedents will appear. Double click the precedent you want to use. The to-dos and appointments involved in the precedent appear in the file's All Events list.
- To modify the events to make them specific to this transaction, simply double click each event and in the Event Details window make any necessary changes and fill in the appropriate dates.
- Click OK.



Note: If any of the events you have saved as a precedent contain Intelligent Assistance, these instructions are retained. i.e. You get convenient DO™ buttons that perform the tasks with one click.

Sample Precedent for Limitation Periods
The tutorial office of Amicus Attorney provides a great sample precedent of how you can keep track of limitation periods on your files.

Go to - Office > Open Tutorial Office > choose Tutorial with Sample Data> then you can follow the steps below to see how you can keep track of limitation periods on your files.

- Open the file on which you want to keep track of limitation periods.
- In the drop down list – choose Events – All Events (for team members – Events – All File Events)
- Click the Use Precedent button
- In the list of saved precedents select – "Limitation Reminders"
- These to-dos will now appear in the file detail:
    - Limitation period expires
    - Limitation is 1 month away
    - Limitation is 6 months away
    - Limitation is 1 year away
- Fill in the actual deadline of the limitation period. All of the other to-dos will hinge on this date.
    - Double click the to do - "Limitation period expires" to see the event details
    - Fill in the date that the limitation period expires in the Deadline box
    - In the Date box specify a date 7-10 days prior to the deadline – this is the date the final reminder will appear on your to-do list

- Click OK
- The other 3 To-dos will be automatically scheduled in your Calendar relative to the limitation period's expiry date – 1 month, 6 months and 1 year from the deadline date.

Precedents in Amicus Attorney are an excellent way to help save you time and improve your efficiency.

YOUR LEGAL LAUGH

Your monthly dose of humor...

Compliments of: www.legalhumor.com.

3. Legal Tips

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

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Part 2:

**If Your Wealth Was Based Solely On Your Client Relations Skills,
Would You Be Rich Or Poor?**

By Nancy Byerly Jones

This article, which was originally published in the Sept. 29, 2003 issue of Lawyers Weekly USA, has been reprinted with the permission of Lawyers Weekly USA, the national newspaper for small law firms. To subscribe, please visit www.lawyersweeklyusa.com or call (800) 451-9998.

Self-Audit For Monitoring How We Are Doing

It's all too easy to get so bogged down in our fast-paced workdays that we let client courtesies and thoughtfulness slide. Our client-relations efforts, in other words, can get lost in the shuffle of trying to keep our heads above water.

It's important, therefore, that we regularly monitor (i.e. conduct quality control checks) how we are treating and serving our clients. A checklist of self-audit questions follows that represents the types of questions you should be asking yourself in regard to your client-relations skill level.

1. Do you do a good job of planning, marketing and getting the types of clients you desire?

2. Do you avoid taking on prospective clients who will likely become problem clients (e.g. they've already spoken to five other attorneys before you, they give you indications that they are difficult to communicate with or otherwise will drive you batty)?

3. Do you set a good example of how to respect and treat clients for your partners, staff and associates?

4. Do your employees who deal with clients do so in a respectful and professional manner at all times?

5. Do you take the necessary safeguards to protect client confidentiality?

6. Are your employees trained in how to protect client confidentialities both in and outside of the office?

7. Do you provide clients with a written engagement agreement?

8. Do you or one of your assistants return clients' telephone calls promptly?

9. Do you keep clients regularly informed as to the status of their cases?

10. Do you have (and use!) a good case management software program or otherwise adequately document your files to reflect all conferences (telephone and otherwise) with your clients and any or all third parties?

11. Do clients receive your undivided attention during telephone or office conferences?

12. Do you meet with clients in private, organized and otherwise presentable areas of your office?

13. Do you frequently (i.e. at least every two months) follow-up and touch base with your clients even when their cases are inactive?

14. Do you offer clients options for voicing concerns, complaints, compliments or suggestions they may have (e.g. client surveys)?

15. If your wealth was based solely on your client-relations skills, would you be rich or poor?

Hands-On Personal Experience As 'The Client'

My husband and I have been clients of a law firm for a number of home closings through the years and for a couple of fairly minor, but nevertheless stressful, litigated matters. Here is a list of things done for us as clients that were positive experiences and greatly appreciated by us:

1. Our copy of all the home-closing documents neatly organized in a notebook for us along with several other materials (e.g. articles of interest to new homeowners, community information, etc.)

2. One attorney who always returned our calls promptly and with enthusiasm (e.g. we didn't have to hear about how busy and crazy his law practice was. Instead, he made us feel like we were his one and only focus when we were in his office and gave us his undivided attention)

3. The always friendly and professional staff of one law office.

4. Employees who answered our attorney's phones professionally and courteously vs. nothing but "Please hold" when the phone was answered.

5. A reliable voicemail system when the attorney or his assistants were not available.

6. Being seen reasonably promptly for pre-scheduled appointments instead of long waits in the reception area.

Here is a list of things we have personally experienced in the client's seat that were not appreciated and definitely did not leave a positive taste in our mouths about the lawyers:

1. A real estate closing attorney who never bothered to turn on any overhead lights while we were signing the endless HUD and other documents involved in closings. We were put in a small conference room and it was a cloudy day so we did not have the benefit of even a little sunshine from the room's one small window. We were very excited about our home purchase, but our moods quickly turned to disgust due to the attorney's rushed manner and his thoughtlessness in not turning on the lights before he started shoving papers and instructions at us. This happened about 18 years ago and we still remember it like it was yesterday. If as an attorney, I am still holding on to that impression of a fellow lawyer, it is not difficult to understand how attorney bashing continues to thrive and survive in today's world.

2. Being flat-out lied to by attorneys as to what would be done or when specific work would be completed.

3. Talking to us in a demeaning, sarcastic and arrogant manner.

4. Having to repeatedly and on numerous occasions explain the facts of our case to an attorney who was either too busy to take careful notes the first time, had his mind on anything but our matter whenever we were talking, or was just more focused on running up his billing time instead of giving us his undivided attention.

5. An attorney who was so busy dealing with the crisis at hand that she never seemed to grasp the whole picture.

6. Having to ask for a written confirmation of the terms of our attorney-client agreement.

7. An attorney who seemed oblivious to one of his employees who was curt, downright rude and who

always acted terribly intruded upon whenever you called their office.

8. Feeling as if we are just another case number to rush through their system instead of fellow humans who had suffered damages due to the acts of another.

9. Seemingly no respect or appreciation of our busy schedules, but rather expected us to drop everything with no pre-warning to respond immediately to his requests or calls.

10. The feeling that the secretary had a far better understanding of the facts and the related law than our so-called attorney.

Unfortunately, our list of negative attorney impressions was far too easy for my husband and me to recall. In addition, there are other negatives that could be listed, but were excluded due to space limitations.

On the other hand, I am a practicing attorney and have also served for many years as a legal management consultant to other firms. I am well aware and proud, therefore, that our profession is blessed with an abundance of excellent, thoughtful and empathetic attorneys. That, however, does not lessen the negative impact on our profession's reputation that is caused by the acts and non-actions of the selfish and arrogant types amongst us or by those of us just so busy that we allow bad habits to creep into our practices.

Walking A Mile In Their Shoes

The majority of us do care about our clients and how we treat them. We should not, therefore, ever allow our empathetic and caring sides to be diluted or smothered by our fast-paced busyness. Rather, it should be an ongoing daily priority for each of us to ensure that we treat our clients just as we would want to be treated if we were in their shoes.

Compliments of:

Nancy Byerly Jones, PLLC
Attorney / Certified Mediator / Legal & Business Management Consultant
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Attorney and mediator Nancy Byerly Jones practices law, serves as a law office consultant and runs an attorney/staff retreat center in the northwestern mountains of North Carolina. For more information, please visit www.nbjconsulting.com, call (828) 898-4910, or send an e-mail to nbj@nbjconsulting.com.

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

Our Customer Service Team Provides Answers to Some Common Technical Questions

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Upgraded your operating system and now having trouble accessing Amicus Attorney?

Some users may experience permission or rights issues after upgrading the operating system on the computer where Amicus Attorney resides. This can occur upon installation of a user or when trying to log in immediately following the computer OS upgrade. In the most common instance the OS on your computer is upgraded from Windows 98 to Window XP, and the new system (Windows XP) supports additional access rights and permission controls that are not available on the older operating system.

When using Windows 98 on the workstation computer, the access rights and permissions are generally done at the server (or computer where the Team40/50 is installed). However with Windows XP as the workstation computer there are often permissions that must be set locally in order to access files on remote computers.

The following is an easy test to determine if there is a rights issue accessing the server computer (where the Team40/50 resides).
Log into the user's workstation computer that is experiencing problems
Browse to the Team40/50 folder via the mapped network drive
Right click and choose 'New > Folder' to create a new folder under Team40/50
If the new folder is created properly then this user has sufficient rights to access the server computer.
If this is unsuccessful then further permissions may be required on this workstation. Please consult the person responsible for network access and or the documentation that came with the new operating system to grant sufficient permissions/rights.

5. Amicus Attorney Premier Consultants

Training, Events and More!

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

WEB BASED 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) - *choose from*: Basic Application Training Advanced Application Training Application Troubleshooting Quick Start (New Clients Only)	Web based - You can take eclasses directly from your own computer.
April 16, 2004	12:00 pm	**TRN206 Amicus Attorney - QuickBooks Link** Use Amicus Attorney to track your time as you work then transfer it to QuickBooks for billing. Exchange contact information between the programs.	Web based

6. Events

Watch for Amicus Attorney at these events.

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For a complete listing of National and Regional Events visit www.amicusattorney.com

2004

Date	Event	Location
April 22-23, 2004	**New Jersey - Association of Trial Lawyers Annual Convention - Boardwalk Seminar** **TQS Solutions** will be exhibiting at this event. www.tqssolutions.com	Bally's Park Place Hotel Atlantic City, NJ
May 12-14, 2004	**Ohio State Bar Annual Convention** For more information or to register to attend: www.ohiobar.org **HMU Consulting** will be speaking and exhibiting at this event: www.hmuconsulting.com	Renaissance Hotel Cleveland, Ohio
May 12-14, 2004	Pennsylvania State Bar Association Annual Meeting www.pabar.org **TQS Solutions** will be exhibiting at this event. www.tqssolutions.com	Hershey Lodge and Convention Center Hershey, PA
May 17–20, 2004	**Association of Legal Administrators (ALA)** **33rd Annual Eduational Conference and Exhibition** **Amicus Attorney - Booth #841** For more information: www.alanet.org	Pennsylvania Convention Center Philadelphia, Pennsylvania
June 6-9, 2004	**Louisiana State Bar Annual Meeting** **www.lsba.org** **InTouch Business Consultants** will be attending and exhibiting at this event. www.intouchbc.com	Village of Baytowne Wharf Sandestin, FL
June 10-12, 2004	**Missouri State Bar 9th Annual Solo & Small Firm Conference** For more information or to register: lawyers.mobar.org/sasf2004 **Timely Office Solutions** will be attending this event.	Lodge of Four Seasons Lake Ozark, MO
June 14-18, 2004	**North Carolina Academy of Trial Lawyers Annual Meeting** **Cumbie Law Office Automation Consulting** will be exhibiting at this event www.cumbieloac.com	Sea Trail Resort Sunset Beach, NC

June 16-19, 2004	**123rd Annual Tennessee State Bar Association Convention** www.tba.org **Nex-Tek Inc.** will have a booth at this annual event. www.nex-tekinc.com	Nashville, TN
June 17-19, 2004	**State Bar of Georgia Annual Convention** **Best Law Firm Solutions** www.bestlawfirm.com will have a booth at this annual event: Thursday, June 17 from 12 pm – 6 pm. Friday, June 18 from 8 am – 6 pm Saturday, June 19 from 8 am – 1 pm	Portofino Hotel at Universal Studios Orlando, FL
June 23-26, 2004	**Florida State Bar Annual Meeting** For more information: www.flabar.org **InTouch Business Consultants** will be attending this event. www.intouchbc.com	Boca Raton Resort and Club Boca Raton, FL
June 24-25, 2004	**State Bar of Texas Annual Meeting** www.texasbar.org **CWB Associates** will be exhibiting at this event. www.cwbserv.com	Henry B. Gonzalez Convention Center San Antonio, TX
June 24-26, 2004	**Oklahoma State Bar – Solo and Small Firm Conference** For more information or to register to attend: www.okbar.org **Cramer Consulting** will be attending this event and conducting a free Amicus Attorney training session. www.cramer.cc	Renaissance Hotel & Cox Business Center Oklahoma City, OK
July 5-10, 2004	**Mississippi State Bar Association Summer School and Annual Meeting** For more information or to register: www.msbar.org/summer_registration/ **InTouch Business Consultants** will be at this event. www.intouchbc.com	Sandestin Linkside Conference Center Sandestin, FL

Send comments to: amicusnews@amicusattorney.com. Send product suggestions to: suggestions@amicusattorney.com.