

# Amicus Attorney News

The Official Newsletter of Amicus Attorney

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Issue 8

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[amicusattorney.com](http://amicusattorney.com)



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1. **Spotlight On ...**

*Highlighting a Feature of Amicus Attorney*

## Amicus Attorney X

### Web Updater

In Amicus Attorney X there are several options for obtaining Amicus Attorney updates via the web including the ability to automatically download and automatically install updates.

Immediately following installation of Amicus X, our website will be checked for any new updates that are available for download (provided you select the "High-speed connection" install option). After installation, you may configure the Amicus Auto-Update feature to check periodically for the latest product updates and, optionally, to automatically download them as well. This means that regardless of when you install Amicus X, you will always have the most current version.

Configuring the Auto-Update feature after installation:

1. Log into Amicus Attorney X as an Administrator.
2. Select Firm Settings in your Office control panel.
3. Choose Updates under the Maintenance heading.
4. Configure your settings to suit your needs.

## Legal Laugh

Your monthly dose of humor...

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

An interactive, computer-based training program that helps you master the basics of Amicus Attorney V.

Brought to you by 2b1 Inc.

For more information or to order - [click here](#).

### Missed An Issue?

No problem. [Click here](#) to view or print from our past issue archives.



**Share the News.**

Do you know others who would like to receive this newsletter? Simply send this issue to them and with one click of the SUBSCRIBE button below, they'll start receiving it monthly.

**SUBSCRIBE HERE**

When configuring your settings, you will need to select your type of Internet Connection in the list box at the top of the Updates view. If you select “Dial-up” Internet Connection, automated updates will not be enabled. Instead, you should manually check for updates periodically, and then manually download and install them.

If you select “High-speed” Internet Connection, you can choose how you want updates to be handled by selecting one of the following:

- Automatically check for and download any available Updates. You can specify how often Amicus checks for updates and whether (and when) the downloaded Updates should be automatically installed where possible.
- Automatically notify Amicus Administrators via Sticky of any Updates available for download. You can then manually download and install them. You can then specify how often Amicus checks for updates.
- Manually check for updates and then manually download and install them.

Enabling the updater is strictly up to you. You may choose not to enable it and instead monitor [www.amicusattorney.com](http://www.amicusattorney.com) for available updates. A convenient link is provided in your Amicus Office Help Center.

# Amicus Attorney V

## Performing Document Searches

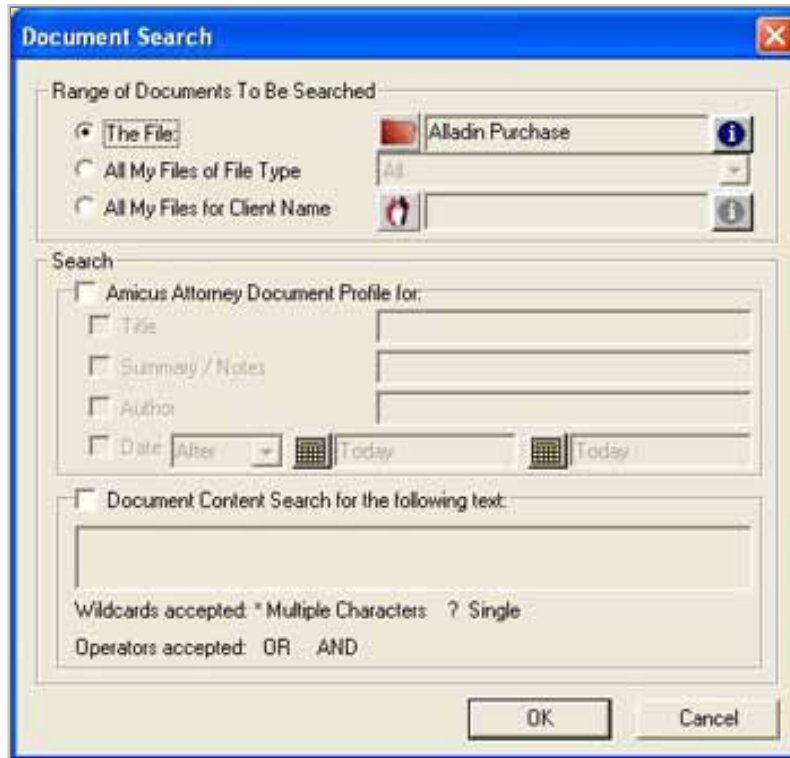
Amicus Attorney lets you attach or map documents, web sites, file directories etc... to your client files. These files can be created in any application, saved in any format, and stored anywhere on your drive or network. They can even be Internet resources. Then, whenever you need to review a document, you can just look it up in the file and open it easily.

You can perform document searches for documents in the Files module. Searches can be performed for documents based on the Document Profile record and/or the actual text content of those documents. Document searches may also be initiated across a single file or a set of multiple files.



### To initiate a document search from the Files menu:

Select Search Documents or, right-click on a list item in a Document file brad and select Search documents.

You will see the Document Search dialog



Select the file range in which you wish to perform a search:

- To search documents on an individual file, select “The File” button, click the  button, and make your selection from the Select a File dialog that appears.
- To search across files of one file type, select the “All My Files of File Type” button, click the down arrow button, and select a file type from the drop-down list.
- To search for a specific client, select the “All My Files for Client Name” button, click the  button, and select the contact name from the dialog that appears.

### To search for a document based on an Amicus Attorney Document Profile:

Activate the “Amicus Attorney Document Profile for:” checkbox and then enter the search criteria into one or more of the available fields: the Title, Summary, Author, and/or Date.

### To search for a document based on content:

Use the “Document Content Search for the following text:” checkbox and then in the field provided, enter the text you wish to search for in the content of the documents. Click OK.

Special Note: The following wildcards are supported: ? and \*

- ? for single characters
- \* for multiple characters

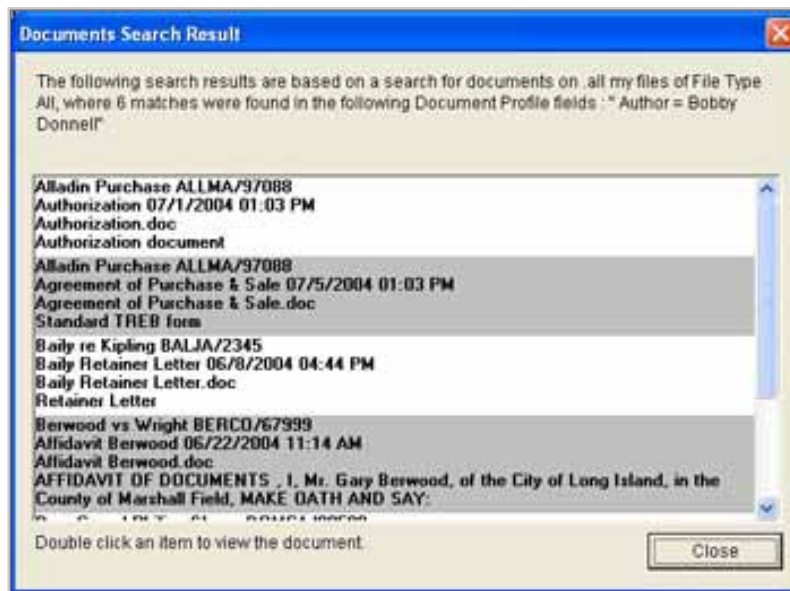
For example, if you wanted to perform a multiple-character search for documents relating to the word litigate, you would enter “litigat\*”. Then all words related to litigate – litigation, litigate, litigates, litigated etc...

To perform a single character search for documents relating to the word litigate, you would enter “litigat?” This will return items such as litigates and litigated

You can also use the words AND, OR in determining your search criteria. For example, you may want to perform a search for all documents containing the words litigate AND damages.

### Document Search Results:

The results show a description of your search criteria and your search results.



Search results display the following:

- File name
- Client ID / Matter ID
- Document Profile Title
- Date
- Document path
- Summary fields

### Document Profile Search Results:

Each result from a Document Profile search is preceded by a number of asterisks. If the document is in Word or WordPerfect format then the summary of the document will be extracted from the document's content. The asterisks preceding the content search results represent the number of hits that the content search has yielded within that particular document.

- \* = 1 hit
- \*\* = 2 to 4 hits
- \*\*\* = 5 to 9 hits
- \*\*\*\* = 10 hits or more

If a search was based on both a document profile and document content, then the lower section of the Document Search Results dialog will show combined results with the content search results shown first, followed by the document profile results.

Sort priority of the content search results is determined by the results that yield the most number of hits within a document. If the content search yields the same amount of asterisks for different document items, then the results will be listed in alphabetical order according to short file names.

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## **Legal Tips**

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



### **Be Profitable!**

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

You've got to make a profit to continue practicing law! I believe there is a direct correlation between outstanding client/customer service and continuing to be profitable. Here are some suggestions to be profitable:

- a. Know the business of your client. Anticipate their challenges and contribute suggestions to help them deal with their challenges. "The more you learn about my business, the more you will earn from my business." (David Cottrell and Mark C. Layton)
- b. Create added value by providing options. This empowers the client to be part of the process. And, it encourages the client to select one of the options which provides you some, if not all, of the engagement you proposed.

### **Four Ways to Get to Market**

There are four ways to increase revenues. The first three result in more work assignments from existing clients. Only the last method requires going outside to seek new clients. From the easiest to the more difficult, from the least costly to the most costly, the following are methods that one of my clients recently spelled out:

- 1. Mine existing files.** Many firms lack sufficient professional staff (attorneys and paralegal) to complete the work required on client matters. Attorneys frequently move from one file to another depending on where the greatest fire exists. The first file oftentimes needs additional work, completing final details, all of which can legitimately be billed. Additional staff usually can pay for itself by completing the work on open files.
- 2. Latent legal business.** Learn more about your client's business. Ask your client what their goals are for the next 5 years. Learn more about what your client does and how the client does its work. You may see areas in which the client would benefit (preventive law) from your involvement ... in areas not even thought of by the client because the crisis hasn't yet erupted.
- 3. Cross sell.** Create a grid of what work is being done now by whom; and what additional work the client might need and the attorneys in the firm who might be skilled in the new areas. When the law

firm is an institution ( a real firm ) rather than a "hotel for lawyers", one attorney works to help his/her partners and associates; the "turf war" is at a minimum, sacrificed for the benefit of the whole. Only when this is done effectively will the firm survive through several generations. Entrepreneurism may get the firm going, but will not keep it going in the long run.

4. Seek new clients. Have a systematic practice development program/plan and systematically work the plan.

Compliments of:

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*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.**



## **FAQs - Frequently Asked Questions**

*Our Customer Service Team Provides Answers to Some Common Technical Questions*



**When posting a 12:00 minute (0.2 hour) Time Entry from Amicus Attorney to Timeslips it ends up as 11:59 when it arrives in Timeslips.** (Applicable to Advanced and Client/Server Edition users of Amicus V and Amicus Attorney Version 4 who are taking advantage of the dynamic link with Timeslips)


### **Issue:**

Something in the process of posting time from Amicus to Timeslips causes the time entries to round down by a second.

### **Cause:**

The problem only occurs when you are creating your time entries by running the Timer function in Amicus Attorney. If you create your time entries in any other way the problem does not occur.

### **Workaround:**

If you are using the Timer to create your time entries, click on the  button in order to go into the Time Entry Details and stop the timer from within that screen. (you probably need to go in there to add your notes anyway)

## YOUR LEGAL LAUGH

Your monthly dose of humor...



Compliments of: [www.legalhumor.com](http://www.legalhumor.com).

### 4. **Amicus Attorney Premier Consultants**

*Training 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 a few 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 ET unless otherwise indicated.

#### **WEB BASED TRAINING**

##### **ProBill Law Firm Solutions**

Boca Raton, FL

(800) 299-9177

[www.probill.net](http://www.probill.net)

[administration@probill.net](mailto:administration@probill.net)

*For more information, contact ProBill Law Firm Solutions via e-mail or phone.*

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 eclasses directly from your own computer.
August 30, 2004	9:00 am	<b>TRN201 Amicus Attorney V - Basics</b> Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based

August 30, 2004	11:00 am	<b>TRN202 Amicus Attorney V - Advanced Calendar</b> Court rules, attaching actions to a calendar event such as generating a document or sending an email, working with the group calendar and more	Web based
August 30, 2004	1:00 pm	<b>TRN203 Amicus Attorney V - Document Assembly</b> Merge information from Amicus Attorney into your documents while linking the document to a File for future reference	Web based
August 30, 2004	3:00 pm	<b>TRN204 Amicus Attorney V - The Library</b> Organize your research materials for easy retrieval, i.e., word processing documents, spreadsheets, websites, paid services.	Web based
August 30, 2004	5:00 pm	<b>TRN205 Amicus Attorney V - ComCenter</b> Everything you need to know about managing emails in Amicus including attaching emails to Files and Contacts. This class also covers other functions of ComCenter namely sending interoffice messages and initiating phone calls.	Web based
August 31, 2004	9:00 am	<b>TRN206 Amicus Attorney V - Timeslips Link</b> Use Amicus Attorney to track your time as you work then transfer it to Timeslips for billing. Exchange contact information between the programs.	Web based
August 31, 2004	11:00 am	<b>TRN207 Amicus Attorney V - QuickBooks Link</b> 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
August 31, 2004	1:00 pm	<b>TRN208 Amicus Attorney V - PCLaw Link</b> Use Amicus Attorney to track your time as you work then transfer it to PCLaw for billing. Exchange contact information between the programs.	Web based
August 31, 2004	3:00 pm	<b>TRN201X Amicus Attorney X - Basics</b> Setting up People, Files and using the Calendar, Telephone & E-Mail features.	Web based
August 31, 2004	5:00 pm	<b>TRN202X Amicus Attorney X - Advanced Calendar</b> Attaching actions to a calendar event such as generating a document or sending an e-mail, working with the group calendar and more...	Web based
September 1, 2004	9:00 am	<b>TRN203X Amicus Attorney X - Document Assembly</b> Merge information from Amicus Attorney into your documents while linking the document to a File for future reference.	Web based
September 1, 2004	11:00 am	<b>TRN204X Amicus Attorney X - Library</b> Organize your research materials for easy retrieval, i.e. word processing documents, spreadsheets, websites, paid services.	Web based
September 1, 2004	1:00 pm	<b>TRN205X Amicus Attorney X - Communications</b> Everything you need to know about managing e-mails in Amicus including attaching e-mails to Files and Contacts. This class also covers other functions of ComCenter namely sending interoffice messages and initiating phone calls.	Web based

**Pricing:** 1st attendee or class - \$99 US (\$139 CDN), 2nd attendee or class - \$89 US (\$119 CDN), each additional attendee or class - \$79 US (\$99 CDN)



## Events

Watch for Amicus Attorney at these events.



Some of our top Premier and local consultants will be at these Regional Events this Summer demonstrating Amicus Attorney. Stop by and get all of your Amicus Attorney questions answered!

For a complete listing of National and Regional Events visit [www.amicusattorney.com](http://www.amicusattorney.com)

## 2004

Date	Event	Location
September 21, 2004	<p><b>The Cal Law Business Conference</b></p> <p>A one day conference filled with tactics and strategies to help small law offices run their practices like a successful business.</p> <p>For more information: <a href="http://www.law.com/jsp/ca/clb_conference092104.jsp">http://www.law.com/jsp/ca/clb_conference092104.jsp</a></p> <p><b>2b1 Inc, Amicus Attorney Premier Consultants</b> <a href="http://www.2b1inc.com">www.2b1inc.com</a></p>	Hyatt Regency San Francisco, CA
September 21, 2004	<p><b>TexLaw Management Booth #113</b></p> <p>Amicus Attorney will be exhibiting from booth #113 at this regional event that will focus on technology, firm management and support services.</p> <p>For more information: <a href="http://www.lawcatalog.com/product_detail.cfm?affil=tx&amp;productID=3772">www.lawcatalog.com/product_detail.cfm?affil=tx&amp;productID=3772</a></p>	Belo Mansion and Pavilion Dallas, TX
October 7-9, 2004	<p><b>Georgia Small Firm/Solo Practitioner's Institute</b></p> <p>For further information visit: <a href="http://www.gabar.org">www.gabar.org</a> and visit the Law Practice Management section.</p> <p>Duhon Technology Solutions, LLC and Best Law Firm Solutions will be exhibiting at this event.</p> <p>Nancy Duhon and Steve Best will also be featured speakers at the practice management shootout on October 9, 2004</p> <p><a href="http://www.bestlawfirm.com">www.bestlawfirm.com</a> <a href="http://www.duhon.biz">www.duhon.biz</a></p>	Savannah Marriott Riverfront Hotel Savannah, GA
October 7-10, 2004	<p><b>State Bar of California – 77th Annual Meeting &amp; Exposition</b></p> <p>This event will feature CLE educational sessions and a vendor exhibit hall. Over 3,500 state bar members are expected to attend. 2b1, Amicus Attorney Premier Consultants, will be exhibiting at this event.</p> <p>For more informatio: <a href="http://www.calbar.ca.gov/state/calbar/calbar_home.jsp">http://www.calbar.ca.gov/state/calbar/calbar_home.jsp</a></p> <p><b>2b1 Inc, Amicus Attorney Premier Consultants</b> <a href="http://www.2b1inc.com">www.2b1inc.com</a></p>	Monterey, CA

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