Amicus Attorney News

The Official Newsletter of Amicus Attorney

January 2004
Volume 2
Issue 1

1. LegalTech New York – February 2004

The first big legal technology event of the year is set for the Hilton NY Hotel and Towers this February 2-4, 2004. LegalTech is the legal industry's largest technology exposition and conference in the United States featuring over 200 exhibitors and three days of comprehensive educational sessions.

If you are planning on attending the event, get a complimentary exhibit hall pass here.

Amicus Attorney will be in booths # 317 & 319, so be sure to stop by and visit us.

For more information on the show, click here.

We look forward to seeing you there!

2. Legal Tips

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

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How to Bill for Completed Work

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

A new lawyer recently asked for billing assistance. Here is a portion of my response...

First, talk with other attorneys in your geographic area about their charges for services similar to what you will provide. Get a feel for the marketplace in which you operate.

Then, determine which of your services will by hourly charges, which will be flat fees and which, if any, will be contingency.

Next, prepare an engagement agreement to be signed by both you and your client ... Be sure to include your fee structure and have your client specifically initial that section.

When you send out your first billing statement to your client, also include a customer survey ... Find out things like i) whether the client was treated well by your staff; ii) whether your client understood the engagement agreement; iii) what the client specifically liked about his/her interaction with you and your staff; and iv) whether there was anything the client didn't understand or didn't like or would have liked better if done differently ... etc.

This will go a long way to make your client feel cared for ...

Attorneys Using Credit Cards to Speed Collection Efforts

Do you allow your clients to use credit cards to pay your legal fees/costs? Some lawyers feel merchant cards for payment of legal fees is "tacky".

My question: Why would use of a credit card option for clients be tacky to you? Why is it tacky to get paid? Seems to me that merchant (credit/debit) cards are part of the American culture today. Offering this option is not commanding it and, therefore, seems to me not to be "tacky" or unprofessional. Those who want to get the frequent flyer miles will do so; those who might not be able to afford you (in their minds) with a check may engage you; those who would rather owe the impersonal bank rather than the lawyer who is responsible for resolving their very important present conflict/challenge/need will pay you with a credit card option if offered. To these folks, the credit/debit card is a wonderful option; to others who would not use the card, it's irrelevant and won't impinge on your relationship. Thus, to the client, it's not tacky ... And thus, why would it be tacky to you to get paid?

A word of caution: Merchant card companies, despite some verbiage to the contrary, will ultimately charge your account for the amount paid if/when a client disputes the amount paid...UNLESS you have an engagement agreement that says something like any and all disputes with your billing must be noted by the client within 10 days of the date of the billing statement or the billing is deemed to be valid and non-refundable. Further, beyond this date (dispute period), client agrees not to dispute any merchant account charge created by the client in accord with this authorization and used to pay the attorney's fees/costs billed.

With this type of language (you may want to contact your merchant bank to create the specific language they prefer), the merchant bank will support you even after a dispute is raised by the client. Without the agreement of the client, in advance, the amount charged will always (at least for six months following the payment) be subject to challenge and credit against your merchant account.

My comments in this note relate to the payment of billed attorney's fees, not to accepting an advance retainer that must be deposited into the clients' trust account. If the funds go into the clients' trust account, be sure that you pay the credit card service fee, leaving the entire principal amount for the benefit of the client, to be used later in accordance with the parties' understanding and agreement. While it is "legal," I don't think I would use a credit card for anything that is to be deposited into the client's trust account ...

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.

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3. Spotlight On ...

Highlighting a Feature of Amicus Attorney

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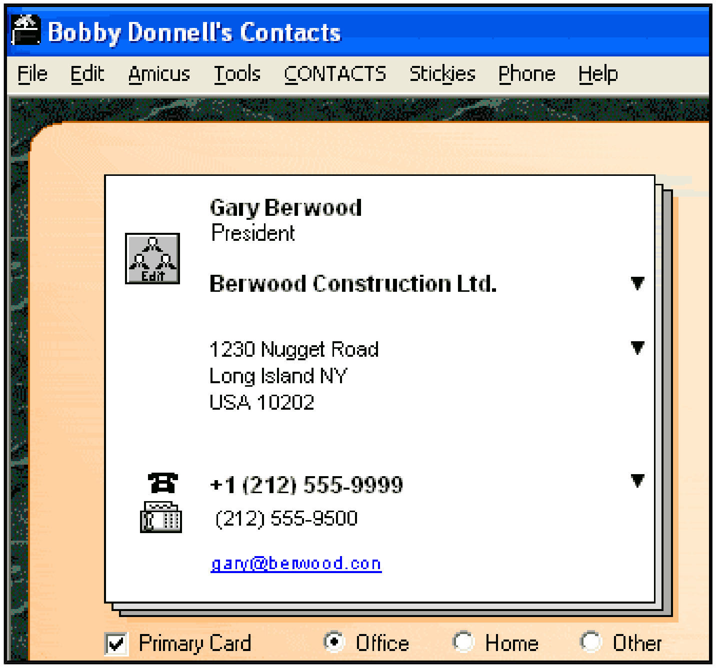
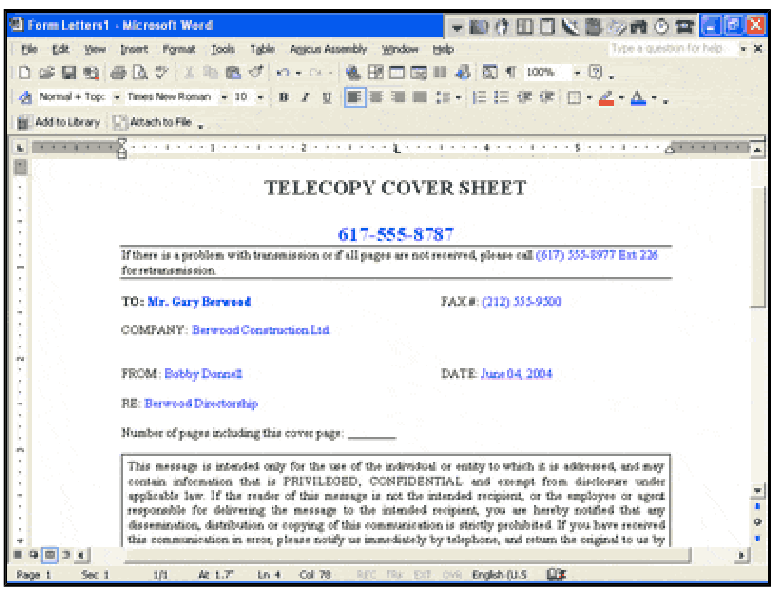
More Document Assembly Options

In the last issue we discussed creating simple mailing lists and labels through Amicus Attorney. Building on this topic, we discuss some further basic document assembly options that are available to all Amicus Attorney users. The easiest example of this is the fax cover sheet that can be created by simply clicking onto the fax icon on any Contact or File (where the Contact has a fax number).



Your word processor (Word or WordPerfect) will launch automatically with a new fax cover sheet already filled out with the essential information. If you do not have the auto-merge feature enabled, then you may have to click the ‘Perform Merge’ button to create the document.



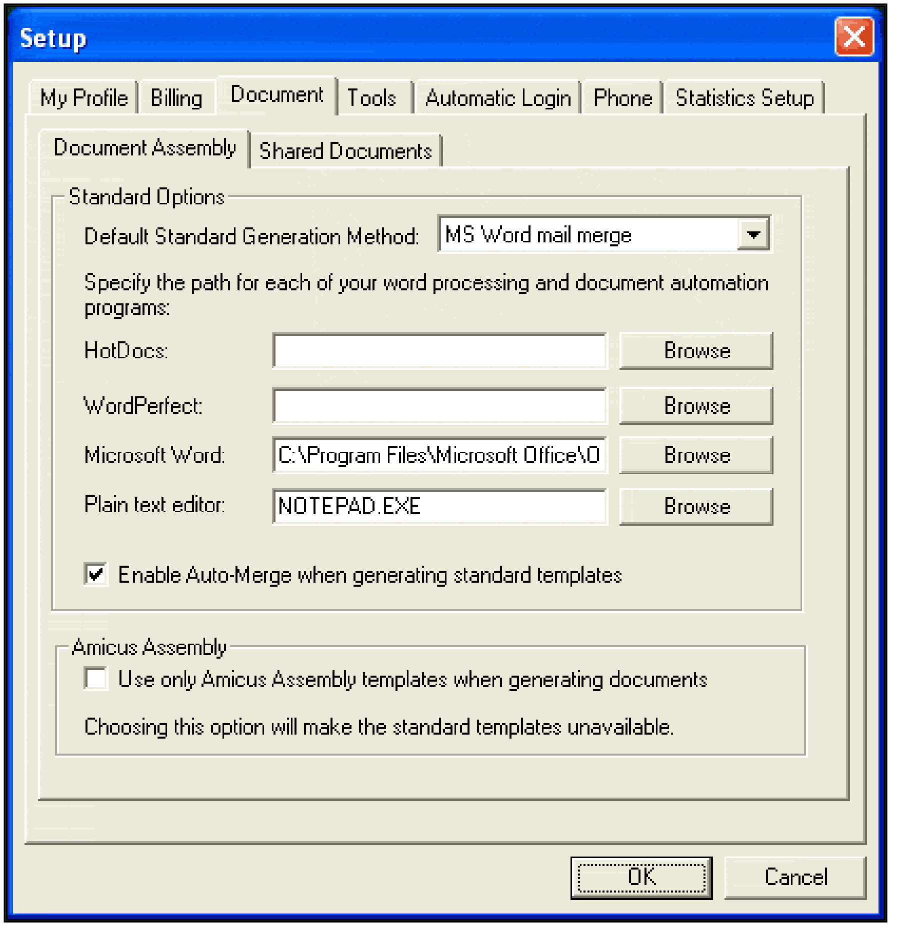
Finished Fax Cover Sheet (merged information in Blue)

<u>Enabling Auto-Merge when generating standard templates</u>

The Auto-Merge feature allows you to create documents more quickly though Amicus Attorney by eliminating the need to click the ‘Perform Merge’ button in your word processor. If you do not have it enabled, then your word processor will launch with the template visible, and only after clicking Perform Merge will the document be created.

This is an individual preference that can be set by each user.

In Amicus Attorney, simply click on File > Setup, and select the Document tab. In the dialogue that appears, select the option to 'Enable Auto-Merge when generating standard templates'.



Click OK. The next time you create a document through Amicus Attorney it will automatically merge the necessary information.

Here are some additional setup tips and preferences that may be helpful for first time users of the document assembly feature in Amicus Attorney.

Working with WordPerfect:

In order to take advantage of document assembly with WordPerfect, there is a macro that must be run the very first time. This will insert the necessary icons into your WordPerfect toolbar, and it will also give you the 'Add to Library' button, and the 'Attach to File' button for saving documents back to Amicus Attorney Library Pages and Files.

In WordPerfect, choose Tools > Macro > Play
In the dialog that appears, browse to the Amimerge folder. (the default install location is C:\Amimerge.)

Select the WordPerfect macro called Aawptlbr.wcm, and click Play.

Now that you have enabled the Amicus Attorney Tasks Toolbar, it will appear in WordPerfect each time you launch the program, and you will be able to take advantage of the document assembly features in Amicus Attorney.

Working with Word:

Amicus Attorney V works with versions of Microsoft Word 97 and later.
If you are using Word 2000, 2002, or 2003, you may need to change the macro security setting in order to use the document assembly feature with Amicus Attorney. Microsoft Word allows for three macro security settings, and if set to high, then no macros can be used in Word documents. Only when set to medium or low can you use the document assembly feature with Amicus Attorney. By selecting the Medium setting, Word will prompt you that a document contains macros, and it will ask you if you would like to enable the macros. Selecting the Low setting will allow all macros to be run in documents that are opened in Word.

Changing the Macro Security Level in Word:

In Word, choose Tools > Macro > Security
In the dialog that appears, choose either the Medium or Low security level, then click OK.

YOUR LEGAL LAUGH

Your monthly dose of humor...

Compliments of: www.legalhumor.com.

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4. FAQs - Frequently Asked Questions

Our Customer Service Team provides answers to some common technical questions

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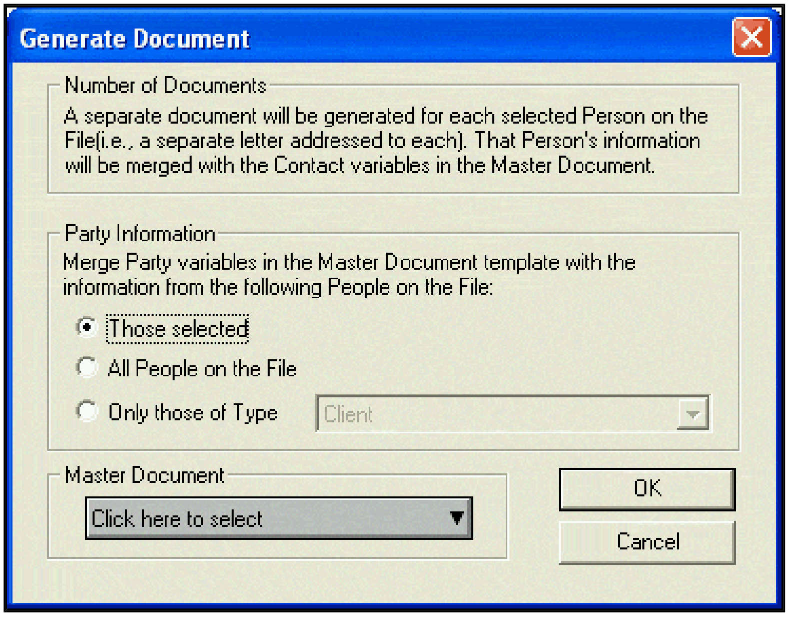
Document Assembly: Party vs. Contact

Issue:

In Amicus Attorney version 5.1 and later, new functionality was added to the Document Generation screen that allowed you to select which parties you wanted to include on a document. This caused some confusion for a number of users who didn't recognize the distinction Amicus Attorney makes between a PARTY and a CONTACT.



Cause:

When you are generating a document from a file and you get the dialog where you can select the above option, you are selecting which parties from the file will be used in the PARTY variables in the document. Instead of all of the parties on the file being made available for the PARTY variables in the document, only those you specify will be sent to the word processor.

Solution:

When you are doing the merge and you see that dialog, it is asking which contacts you want to merge into the document as the Parties on the file. All the parties of that type or those selected will be merged to the document anywhere you have a Party variable (e.g. Party1address, Party3FirstName, etc.)

Normally, when you do a merge, the contacts:

Jim Smith Client
Bob Jones Lawyer
Raj Sanji Judge
Tim Chan Witness
Roger Fargo Witness

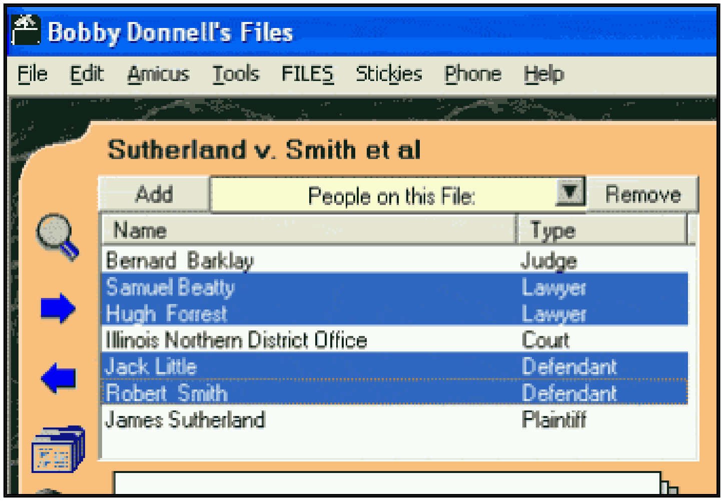
Would be sorted alphabetically (with the client(s) always appearing first) just as you see them in the file and then exported to your word processor as the following parties:

· Party1: Jim Smith
· Party2: Tim Chan
· Party3: Roger Fargo
· Party4: Bob Jones
· Party5: Raj Sanji

If, however, you select to only send out parties of type "Witness" from that dialog, the parties that get sent to the word processor will be:

· Party1: Tim Chan
· Party2: Roger Fargo

If you want to create multiple copies of a document for a certain selected set of parties on the file, you will need to select them from the list of People in the File before selecting to generate the document. You can select multiple names from the list by either holding down the CTRL key and clicking on them one at a time or by selecting one and then selecting another while holding down the SHIFT key to highlight all the ones in-between.



When you click to generate a document, a separate document will be created with the CONTACT variables for the document filled in appropriately for each contact.

Please note that Amicus Assembly can be used to create even more sophisticated documents (including PDF, HTML, RTF, and DOC formats) that can take into account specific roles on a file and have them merged within the same document. Amicus assembly is an add-on to Amicus Attorney V.

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5. 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.
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:

Best Law Firm Solutions Inc.
Atlanta, GA
(770) 998-3800
www.bestlawfirm.com

For more details, visit their web site.

Date	Time	Training Session	Location
January 29th, 2004	9:00 am – 4:00 pm	Advanced Amicus Attorney Workshop	Atlanta, GA
January 30th, 2004	9:00 am – 4:00 pm	The Amicus Administrator Workshop	Atlanta, GA

ONLINE & CD-ROM TRAINING PROGRAMS:

CD-ROM TRAINING

2b1 Inc.
San Francisco, CA
(415) 284-2221
www.2b1inc.com

It's basic! Whether you need to get started or brush up on your Amicus Attorney skills, Amicus Attorney V Basic Training is the perfect desktop training tool. Easy-to-follow animation covers all of the basic functions of Amicus Attorney V. The training is available for download as well as on CD-ROM.

To download a copy or get more information, visit http://www.2b1inc.com/c-training.htm.

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.
January 8th, 2004	3:00 pm	**TRN201 Amicus Attorney - Basics** Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
January 9th, 2004	2:00 pm	**TRN202 Amicus Attorney - Advanced Calendar** 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
January 12th, 2004	3:00 pm	**TRN203 Amicus Attorney - Document Assembly** Merge information from Amicus Attorney into your documents while linking the document to a File for future reference	Web based
January 13th, 2004	3:00 pm	**TRN204 Amicus Attorney - The Library** Organize your research materials for easy retrieval, i.e., word processing documents, spreadsheets, websites, paid services.	Web based
January 14th, 2004	3:00 pm	**TRN207 Amicus Attorney - ComCenter** 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
January 15th, 2004	3:00 pm	**TRN205 Amicus Attorney - Timeslips Link** 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
January 16th, 2004	2:00 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
February 2-4, 2004	**LegalTech New York** **Visit us in Booths #317 & 319** For more information: www.legaltechshow.com	Hilton New York Hotel & Towers New York, NY
March 25-27, 2004	**ABA Techshow** **Visit us in Booths #513 & 515** For more information: www.techshow.com	Sheraton Chicago Chicago, IL

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