Amicus Attorney News

The Official Newsletter of Amicus Attorney

July/August 2003

Volume 1 Issue 7

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Happy Summer!

All of us at Gavel & Gown Software Inc. hope that you are having a great summer. This issue is our July/August 2003 Summer Issue. Watch for our next issue in early September!

1. You Have to Try This!

Practical Tips and Tricks from Amicus Attorney Certified Consultants

Tracking Your CLE Events in Amicus Attorney
By Sheryl Cramer, Cramer Consulting, Inc.

Does your secretary run from you at the end of the year when she sees you coming with your annual CLE report due to your State Bar? Amicus Attorney can easily track this information and make it accessible for your yearly report with the click of a button.

First, set up an Event Category and File Type of CLE (this is set up through the Amicus Administrator). Next, open up a new File and give it the File Type of CLE. Name it CLE or CLE – year. You can do one general CLE for all attendances no matter what calendar year or open a new one for each year, ie CLE - 2003.

If you choose a new file for each year, when you open the new file close out the old file. To make the CLE File easier to find in your file folder, use the status of "Special". When you schedule a CLE event to attend, give it the category code of CLE and assign it to the CLE File. In the Event Notes section enter in how many hours you will receive and any other important information. At the end of the year open up your CLE file, go to Events > All File Events and Voila! You are now a hero with your secretary.

Compliments of:

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Sheryl Cramer is an Amicus Attorney Certified Consultant and has spent more than a decade helping lawyers become techno. efficient. From setting up basic business practices needed to run a law practice to implementing profit -- and time-maximizing technology tools such as

amicusattorney.com

Pass It On!

Know anyone else who would be interested in receiving the Amicus Attorney News? Simply send this edition to them and with one click of the "Subscribe Here" button below, they will also start receiving it in their in boxes every month.

SUBSCRIBE HERE

INTRODUCTION to AMICUS ATTORNEY V

Your Step by Step Guide (5.1.1)
by Lori Berenson
This 250 page comprehensive training manual, designed for beginner and intermediate users of Amicus Attorney, is available for purchase on the Amicus Attorney web site. For a listing of topics covered and sample lessons of this easy-to-follow learning guide, click here.

SUGGESTIONS

Have suggestions for the eNewsletter?
We want to hear them!
E-mail us at:
amicusnews@amicusattorney.com

Legal Laugh

Your monthly dose of humor...

Legal Tips

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

Simple Keys to Great Client Service

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

1. Answer your phone in less than 3 rings
2. Put a smile on your face and in your voice
3. Consider everyone as your potential client
4. Stay perky
5. Do what you say and say what you do
6. Empower your staff to handle client problems on the spot
7. Attitude is everything! The client is always #1.

Empowerment Makes the Office Work More Effectively

Empowering your staff will make your staff more effective in dealing with your clients and help you run your practice more efficiently. This is a "truism" which has been proven on more than one occasion in the business world. Lawyers would benefit by following the same example. The following is a list of characteristics of empowerment, created by Tim Conner, a recognized speaker in the field.

Empowering organizations:

a. give authority with responsibility
b. clearly communicate and reinforce consistent direction to all staff
c. have clear and flexible goals
d. focus on strengths, not weaknesses
e. set goals and strategic plans with a combination of top-down and bottom-up feedback
f. listen to all employees equally
g. create a safe environment where staff can feed up bad news without the fear of criticism, termination or being perceived as a poor team player
h. get lots of suggestions/recommendations/creative ideas from employees
i. do not punish mistakes, failures or risk taking, but use them as a tool for learning and improving
j. do not micro-manage staff's actions and decisions
k. encourage ownership in policies, goals, vision, direction and purpose.

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. 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.

3.

Spotlight On ...

Highlighting a Feature of Amicus Attorney

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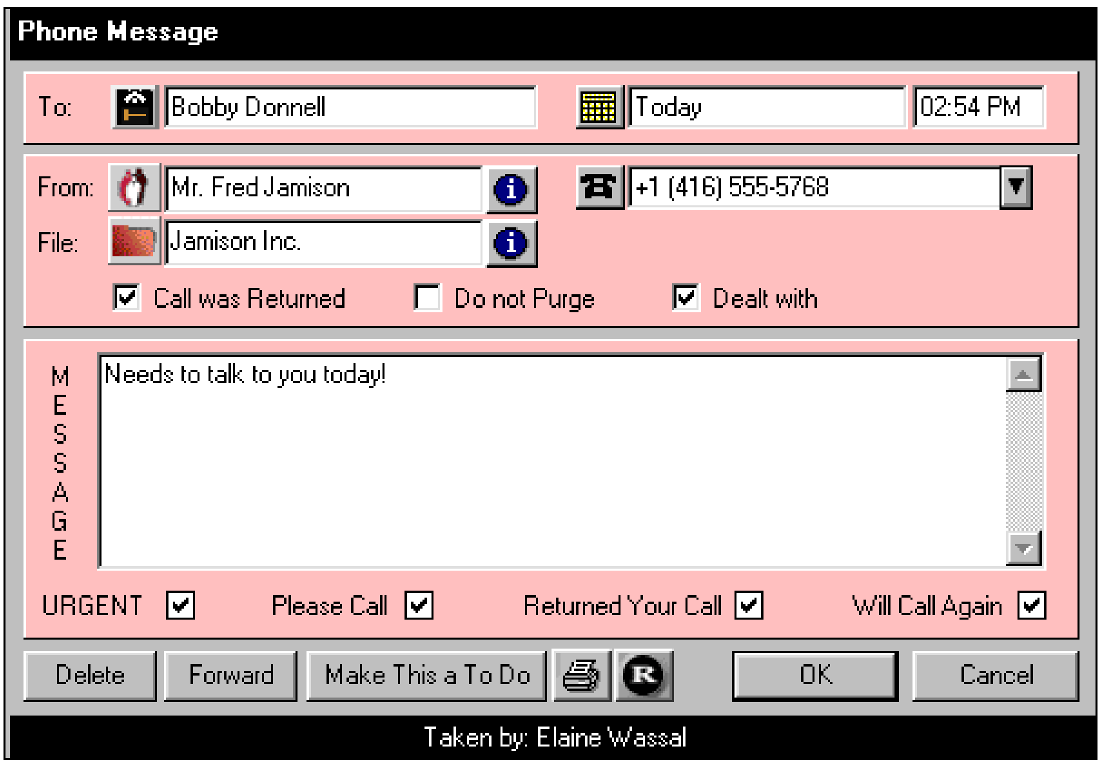
Communications: Setting Preferences for Phone Messages and E-Mail Integration

Amicus Attorney helps manage all of your daily communications in a central location. The ComCenter has you covered whether it's phone calls, phone messages, or e-mails. There's also the Stickies feature for internal instant messaging with other Amicus Attorney users in the office.

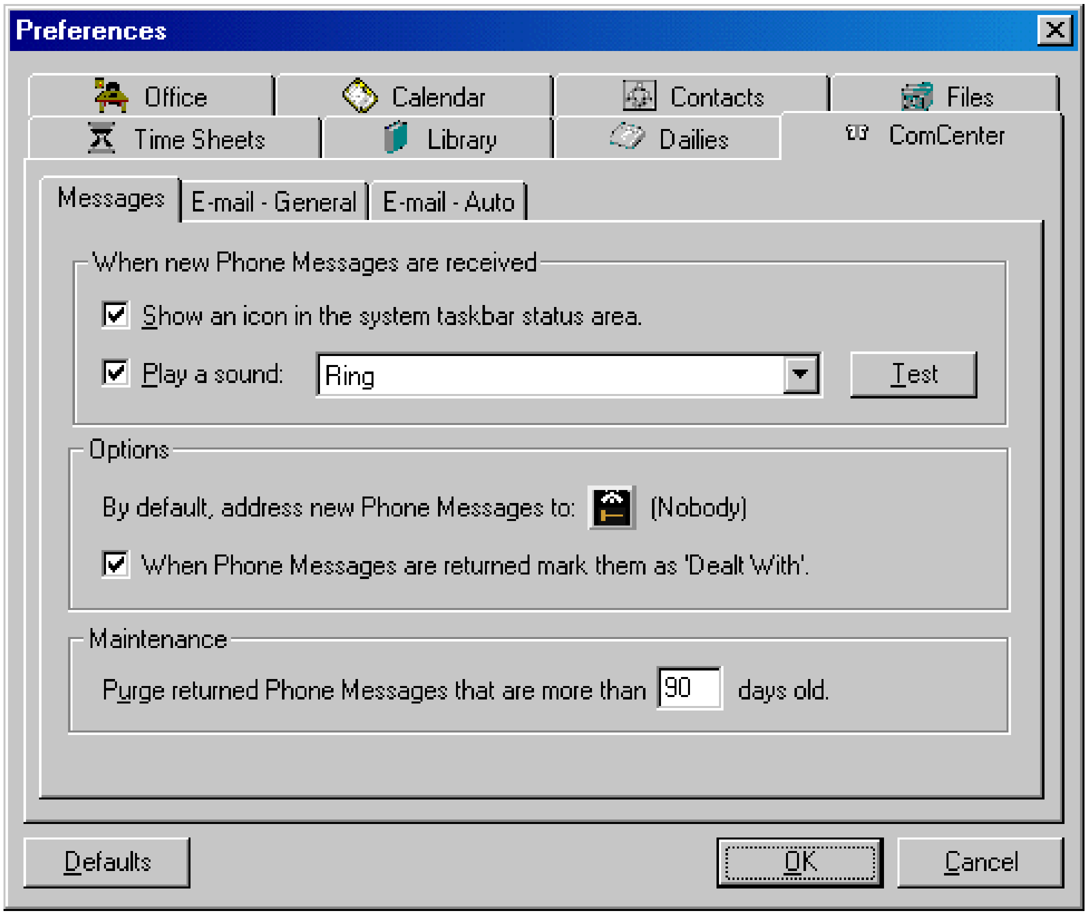
The ability to keep a record of all of your incoming and outgoing communications is very important, and your phone messages and e-mails are a big part of that.

Phone Messages
Amicus Attorney phone messages can be used when both taking a call for another team member, or for keeping a record of your own voice mail messages as you pick them up. There is a preference setting that may make it even easier. If you primarily use the feature to record your own voice mail messages, then you can change the preference so that you are the default team member assigned when you create new messages. This will automatically fill in your name as the recipient so that you don't have to select it every time. Another option is if you mainly use the feature to take messages for one particular person, then you can set that person as the default team member on your new messages. These preferences are set by each team member, so it can be setup the way each team member works.



Changing Phone Message Preferences:
Select File > Preferences > ComCenter > Messages. In the options section, there is a preference for: "By default, address new Phone Messages to". Click the Amicus Button to select the appropriate team member (Only one name may be selected). If you primarily use the feature to record your own voice mail, then choose your own name from the list of team members. If you use the feature to primarily take messages for someone else, then you can select their name from the list. Click OK to accept the changes.

Now that you have made the change, any time you create a new phone message in your office, the team member information will already be filled in. If you wish to address it to another team member, you can simply select their name from the list.



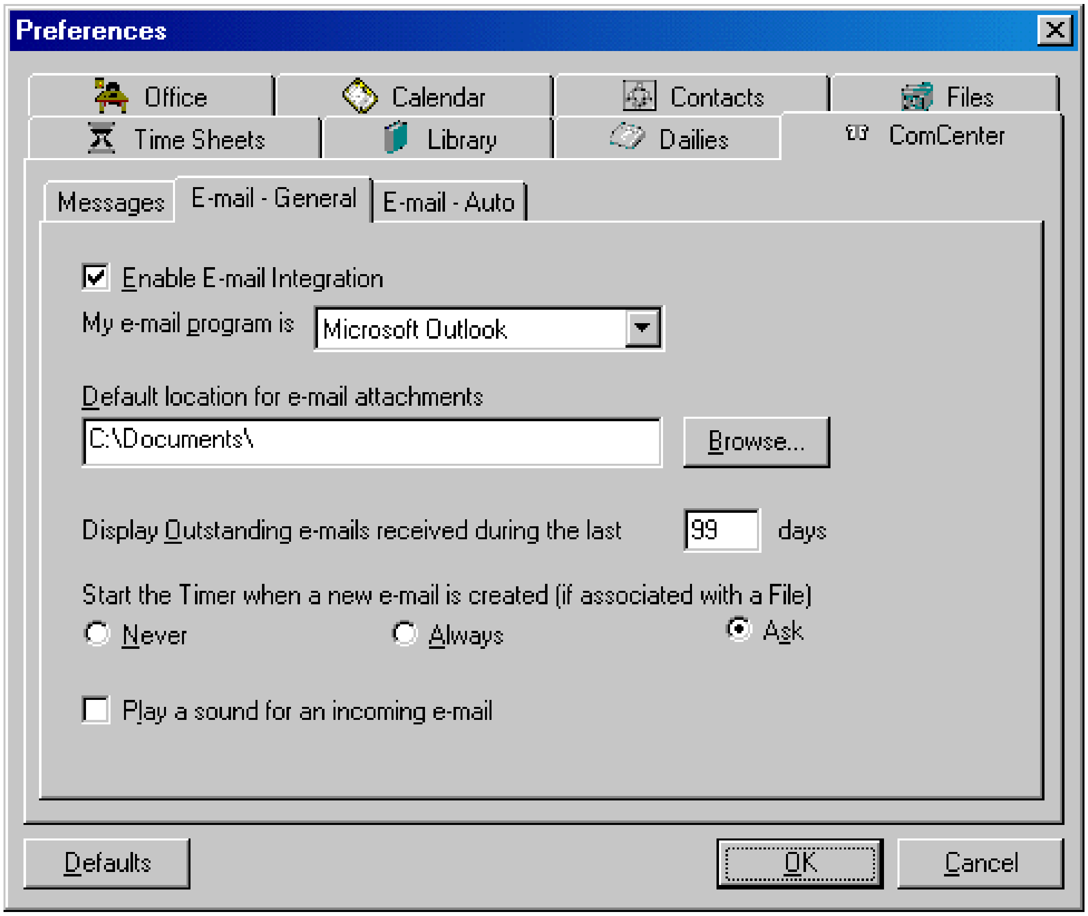
E-mail Integration

Amicus Attorney can help manage your outgoing and incoming e-mail communications so that you always have a record of your messages on your contacts and files. In order to enable e-mail integration, you must be using either Microsoft Outlook or Novell GroupWise.

Sending messages is a snap, just click on any listed e-mail address in Amicus Attorney, or right click any contact, and you can send a message. A record of the communication is saved in Amicus Attorney to the appropriate contact, and to the correct file, if applicable.

Incoming messages are also seamlessly managed within the Amicus Attorney ComCenter. Having enabled e-mail integration, you can choose to turn on the Auto-Save feature. This feature will automatically save sent and received messages in your e-mail provider that Amicus Attorney recognizes as belonging to a contact in your Amicus Attorney. With this turned on, Amicus Attorney will automatically check every incoming message and compare the address to that of your Amicus Attorney contacts. If it detects a message as belonging to one of your contacts, then the message will automatically be saved to their contact card. If that contact is assigned to a file, then the association will also be made there. If the contact happens to be on several different files, then it will allow you to select which file you wish to have the message saved to.

You can choose to exclude messages from certain contacts from being auto saved. This is handy when you have a personal contact in Amicus Attorney where it is unnecessary to track the history of e-mail communications. This setting can be accessed from the ComCenter Preferences and on individual contacts.



ComCenter Preferences:

Enabling E-mail Integration:
Select File > Preferences > ComCenter > E-mail – General. You can enable e-mail integration and choose your e-mail program, as well as change certain settings. Click OK once you have made your changes. If you enable e-mail integration, then the changes will take effect the next time you log into Amicus Attorney.

Turning on the Auto-Save Feature:
Select File > Preferences > ComCenter > E-mail – Auto. You can choose to turn on the Auto-Save feature, and also choose the contacts whose e-mail addresses should be excluded from the automatic save. The next time you log into Amicus Attorney you may experience a slight delay while it processes any unsaved e-mail messages. The length of time will depend on the size of your e-mail inbox and the total number of contacts. After your initial login, the auto-save feature will not have to go through all messages, so the process will speed up. You can choose to disable the auto-save feature at any time if you wish.

When creating a new contact, or editing the communication information for an existing contact, you can check off the option "Do Not Auto-Save E-mails from this Contact". This will prevent any messages from that contact from being auto-saved by Amicus Attorney.

The Auto-Save feature is a time-saver and it helps to ensure that you keep a complete record of all of your communications. You do not have to enable the Auto-Save feature in order to enjoy the convenience of e-mail integration. You can simply pick and choose which e-mails will be saved in Amicus Attorney.

What if the e-mail address isn't in Amicus Attorney? If you receive an e-mail message from someone who has not yet been entered as a Contact, then Amicus Attorney can ensure that they are quickly added to your database. Open the message in Amicus Attorney, and without selecting a contact simply click the save button. Amicus Attorney will ask if you wish to create a new contact for that e-mail address. The contact will be created in Amicus Attorney, and the message will be saved to that contact. Any future messages from that contact will be auto-saved now that the e-mail address matches a contact in Amicus Attorney.

If the person already exists in Amicus Attorney as a contact, but is missing an e-mail address, then the Auto-Save feature will not recognize it. However, you can just associate the message with the correct contact, and click OK. It will then allow you to save the e-mail address listed on the message to the contact in Amicus Attorney. Subsequent messages from that person with then be picked up by Amicus Attorney and automatically saved to the appropriate contact. Within Amicus Attorney, each contact can have up to 3 e-mail addresses listed on their contact card (home, business, other).

**E-mail integration requires Amicus Attorney V and a Fully-MAPI Compliant e-mail program. The Phone Message preference described above is also unique to Version V.*

YOUR LEGAL LAUGH

Your monthly dose of humor...

Prosser vs. Harry Potter: Battle of the Heavyweights

My son saw my first-year law casebooks and picked up my Torts book. His first comment was "1200 pages, that's more than Harry Potter!" (The fourth Harry Potter book has 700 pages.) Then he asked me, "What is Torts?" He's a bright boy, but he is only nine.

I asked him: "If you park your bike on the sidewalk, and a man hits your bike with a car, who did something wrong?" He said the man with the car. I asked why. My son answered "Because I'm allowed to put my bike on the sidewalk, but he isn't allowed to drive on the sidewalk." I said "Correct."

Then I asked him: "Does the man in the car have to pay for the bike?" My son said yes. Then I said, "What if you get off your bike on the street and you leave it there just for a minute, and a man in a car hits it?" My son said, "It's my fault." I asked why, and he said, "Because I shouldn't have left it in the street."

Then I asked him if the man in the car has to pay for the bike. My son answered, "No." I asked him why and he repeated, "Because I shouldn't have left it in the street." I told him good job, that's what Torts is. He said, "Is that it?" I told him "Yes." Then he looked real confused and said, "Then why does the book have 1200 pages?"

Compliments of www.lawhaha.com.

4. FAQs - Frequently Asked Questions

Our Customer Service Team Provides Answers to Some Common Technical Questions

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I just added a new team member to Amicus Attorney but why aren't they assigned to any of the files or contacts we have?

A new team member by default isn't assigned to any Files or Contacts. They need to be assigned to them. This is done through the Amicus Administrator. You will find this function under the Database Menu > Management > User Assignments. Here you can share out any or all Contacts and Files to the new person(s). You may also choose to assign the user to a group which will cause them to receive all of the Files and Contacts that the group is assigned to. You may then want to go into the File > Preferences on each workstation and add the new Team Member(s) to the Files and Contacts within the New Files or New Contacts tabs. Here you may also set the users on the new Calendar Events in the same manner so that they will be assigned to items by default from this point on.

For further details on performing the User Assignments or Group Assignments please consult Chapter 21 of the User Manual which will provide in depth details and screen shots to assist you.

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.

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
July 31st, 2003	9:00 am	Advanced Amicus Attorney Workshop	Atlanta, GA
August 1st, 2003	9:00 am	The Amicus Administrator Workshop	Atlanta, GA
September 18th, 2003	9:00 am	Advanced Amicus Attorney Workshop	Atlanta, GA
September 19th, 2003	9:00 am	The Amicus Administrator Workshop	Atlanta, GA

Henley March & Unger Consulting, Inc.

Columbus, OH
(614) 340-3444
www.hmuconsulting.com

For more details, visit their web site.

Date	Time	Training Session	Location
September 8th, 2003	9:00 am - 1:00pm	Amicus Attorney Training Course	Ohio State Bar Association Columbus, OH

Northshore Technology Center

Covington, LA
(985) 893-7062
cleblanc@northshoretechnology.com

For more details, please call or e-mail Northshore Technology Center.

Date	Time	Training Session	Location
July 30th & 31st, 2003	9:00 am - 4:00pm CST	Amicus Attorney Classroom Training	Covington, LA

ONLINE & CD-ROM TRAINING PROGRAMS:

CD-ROM TRAINING

2b1 Inc.

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

Amicus Attorney V Basic Training: PC Desktop training for the Amicus Attorney user. The easy-to-follow animation covers the most used functions in Amicus Attorney. This downloadable training is user-friendly and very affordable. For a CD ROM contact us.

For more details, visit their web site.

CD-ROM - Amicus Attorney V Basic Training

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) - *choose from*: Basic Application Training Advanced Application Training Application Troubleshooting Quick Start (New Clients Only)	Web based - You can take classes directly from your own computer.
August 18th, 2003	3:00 pm	**TRN201 Amicus Attorney - Basics** Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
August 20th, 2003	3:00 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
August 22nd, 2003	2:00 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
August 25th, 2003	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
August 26th, 2003	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
August 29th, 2003	3:00 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