

Amicus Attorney News

The Official Newsletter of Amicus Attorney

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2004

Volume 2
Issue 7

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

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

Practical Tips and Tricks from Amicus Attorney Certified Consultants

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

Highlighting a Feature of Amicus Attorney

4. [Legal Tips](#)

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

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

Our Customer Service Team Provides Answers to Some Common Technical Questions


6. [Amicus Attorney Premier Consultants](#)

Training and More!

7. [Events](#)

Watch for Amicus Attorney at these events.

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800-472-2289

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

Gavel & Gown Software Highlighted on World Business Review TV Series Hosted by General Alexander Haig

Gavel & Gown Software will be featured this July on World Business Review, hosted by General Alexander Haig. The segment will focus on Amicus Attorney and the numerous benefits this leading practice management software offers law firms from around the world. Ron Collins, President of Gavel & Gown, as well as Robert Colson, Amicus Attorney customer and partner with Teplitzky Colson, appear in the segment.

World Business Review airs on CNBC Paid Programming and Tech TV. World Business Review may also be viewed on United Airlines in-flight TV or through video on demand.

According to Barbara Aroeste, Coordinating Producer of World Business Review, Gavel & Gown Software was a natural selection for the show. "Practice management software is simply a must-have item for practicing law in this millennium", said Aroeste.

The preliminary air dates include:

Friday July 9 on TechTV - 6:30am ET
Sunday July 11 on CNBC - 11:30pm PT

**Future dates TBA.

The WBR Series is also available at more than 50 prestigious colleges and universities, including Carnegie Mellon University, the University of Notre Dame, Dartmouth College and Georgetown University. www.wbrtv.com

For more information see press release, [click here](#).

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.



You Have to Try This!

Practical Tips and Tricks from Amicus Attorney Certified Consultants



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

Transfer License Feature

This feature applies to Amicus Attorney V Advanced and Client/Server Edition users.

The transfer license feature in Amicus Attorney provides a way to add new team members in place of former team members. It also allows you to effectively transfer records from the former to the new team member without any supplementary licensing requirements.

If you ever need to transfer a license in your firm, here are a few things that I recommend that my clients do prior to and after a license transfer.

1. Prior to transferring an Amicus license, all Time Entries must be posted from the old user's office. (The license transfer will not begin if there are any unposted time entries)
2. After transferring an Amicus license, be sure to check Setup and Preferences for each Team Member:
 - a. PREFS > Files > New Entries > Team Members on New Files
 - b. PREFS > Contacts > New Entries > Team Members on new Contacts
 - c. PREFS > Calendar > New Entries > Team Members on new Events
 - d. PREFS > ComCenter > Messages > Options > Default messages to
 - e. SETUP > Workgroup
 - f. SETUP > My Profile > Detail

All necessary record reassignments are automatically made to allow the new Team Member to assume the role of the former Team Member from the current date forward. The former Team Member's name will still be listed on any records prior to the current date.

Compliments of:

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Lori Berenson is an Amicus Attorney Certified Consultant and author of "Your Step by Step Guide to Amicus Attorney". Lori is currently working as a Legal Applications Consultant for Accellis Technology Group, offering consulting and training services for Amicus Attorney users, as well as other legal application services. Visit Accellis' website at www.accellis.com, or call Lori for more information about their legal consulting and networking services.



Spotlight On ...

Highlighting a Feature of Amicus Attorney



Amicus Attorney X

The Calendar

To help you organize your time, Amicus keeps track of all of your appointments and things to do in the Calendar module. Appointments and To Do's appear not only in the Calendar, but also in the Files to which they are related, and in the records of the People who are assigned to them.

When you first open the Calendar in Amicus X, it displays, by default, your Appointments and To Do's in the Day view for today. You can change this default view by creating a Calendar Profile and setting it as your default.



The top section of the Day view shows your Appointments for the date indicated in the heading, while the lower section lists the To Do's for the day you are looking at. In this bottom section, you can also optionally list your Communications or your Diary entries for the day. Plus you have the option to view a full 24-hour Day View and the option to expand the Appointment view to fill the screen. Quickly navigate to any day using the mini month calendar.

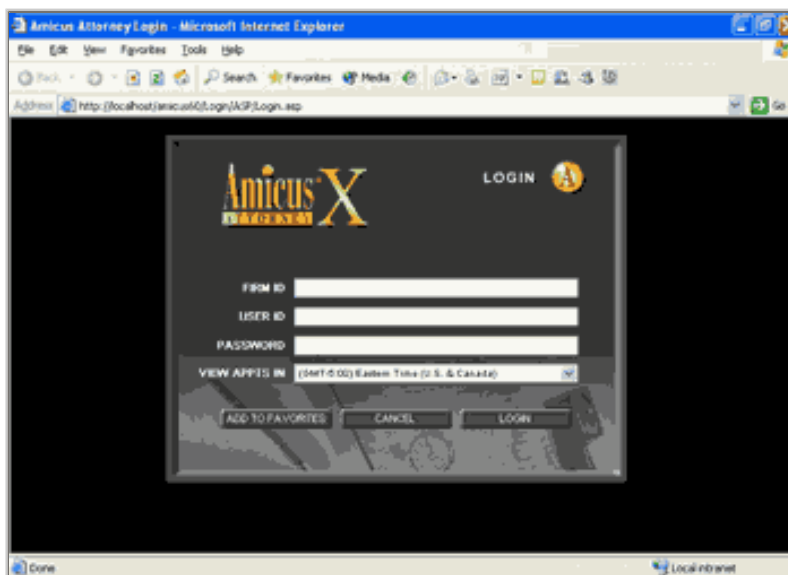
Events can even be scheduled to last for up to 7 full days.

The Day view converts to a multi-column schedule with an optional combined column for easy group scheduling. Custom Calendar profiles can be defined and applied against all Calendar views for who, how, and what calendars to display, as well as the time period. You can quickly switch between custom profiles via the drop-down list.

New in Amicus X are Location, Duration, Time Zone and Completion Status fields in the Event Details dialog. You can specify a location (e.g. Courthouse) or a specific address for an Appointment by using the Location Box in the Event Details dialog. When you schedule an Appointment by clicking and dragging the cursor over the desired time slot in the Calendar, the Duration of the Appointment is automatically listed.



In your display preferences, you can specify the default Time Zone on login. You can also optionally select the Time Zone at login. This allows users who are traveling to override the default time zone set in their Amicus preferences. For example, Time Zone settings allow you to create an Event for 9:00am Eastern Time and then when you login under Central Time, the Event will then appear at 8:00am



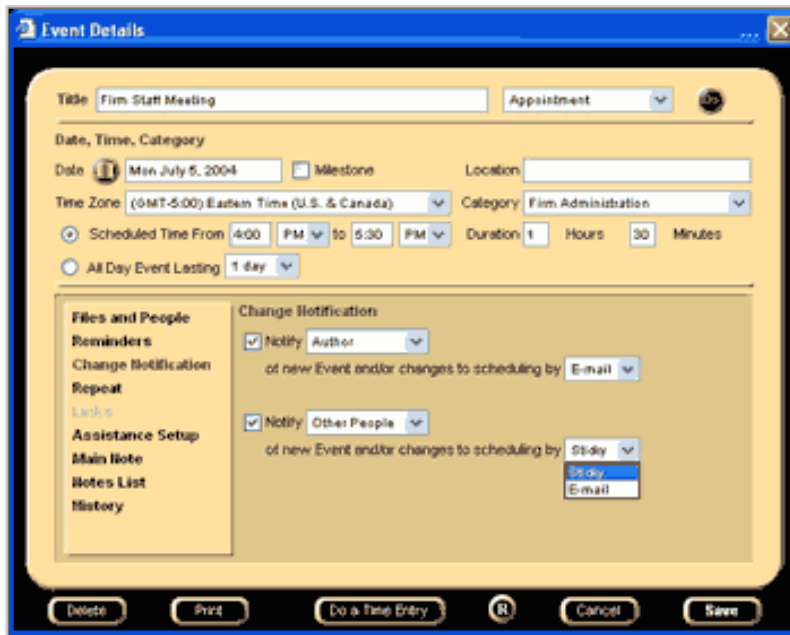
To help manage your To Do's, you can indicate how complete a To Do is by typing a percentage in the Completion Status box. At a glance, you will be able to quickly see where you are with that To Do.

Milestone Events are the new critical Events that can be created for the past, present or future. Milestone Events may be used to record dates of service, requisition dates, filing dates, or other events you wish to highlight.

The Events View has been renamed "Lists" view with dual functionality for showing lists of Events for multiple users, find results, as well as predefined lists of your Events. You have the ability to sort and size lists columns.

Change Notifications for an Event:

You can set up to two different rules for automatically notifying People whenever an Event is changed or deleted. This includes changes to Date, Deadline, Start Time, or Location. Select who will receive the notification and how they will receive it – "Sticky" or "E-mail".



Event Reminders:

Up to three different Event Reminder rules can be set, each for a different combination of People associated with the Event, notification method, and time. Send the Event Reminder to the “Author”, “Firm Members”, “Contacts” (Non-Firm Members), or “Everyone”.

Choose how this Reminder should be sent:

- “Reminder Alert” – for Appointments only
- “Sticky” – for To Do’s only
- “E-mail” – for Appointments, To Do’s or Red Letter Days

You can even indicate when this reminder should be sent; “Minutes Before”, “Hours Before”, or “Days Before”. To set a specific date for the Reminder, simply select the “On This Date” option in the drop down menu and choose the appropriate date and time.

For example, you can send yourself an e-mail two days before, send an e-mail to all People on the Event one day before, and send a Sticky reminder to the Firm Members at 10:00am on the day of.

Notes:

There is a Main Note for every Event as well as the ability to associate multiple Notes records. The Main Note on the Event is the note field used for exchange with third party links, such as the Palm Link and the Microsoft Outlook Contacts and Calendar Link. Notes provide a convenient way to jot down and store information associated with Files, People, Events, Time Entries, and so on. You can type in any additional information about an Event in the Notes view of its Event Details dialog.

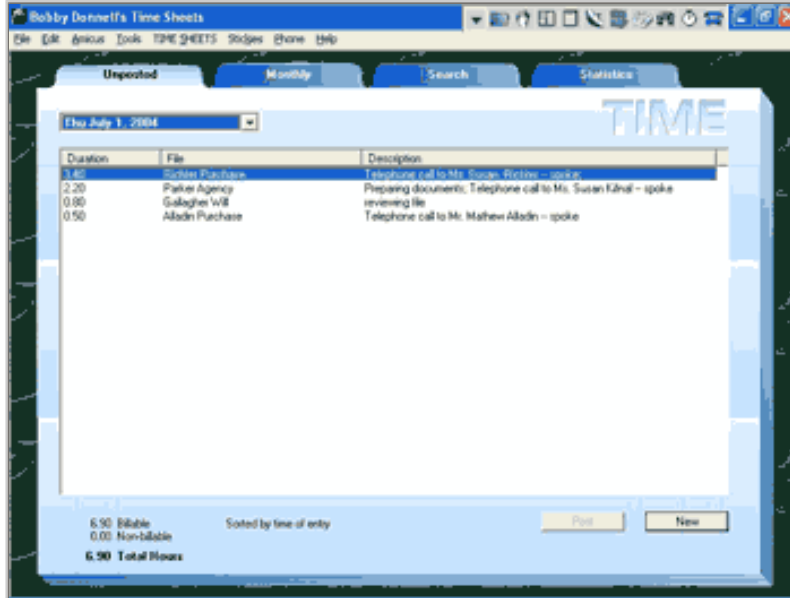
History of Changes Made to an Event:

The History log lists changes made to the Event. It lists changes made from oldest to newest. The date of the change, name of the Person who made the change and the nature of the change are shown. Many changes are tracked in the log including changes to time, Deadline, Priority and more.

For more information on the Calendar in Amicus Attorney X take a look at the Feature Tour available on our web site: http://www.amicusattorney.com/products/prod_feature_tour.html

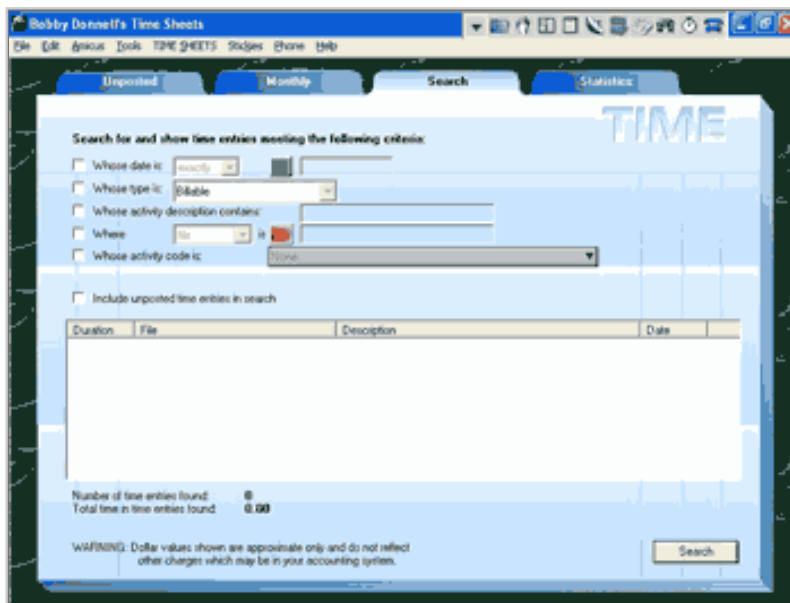
Searching Time Entries

Amicus Attorney is a useful tool for managing your time entries. Not only can you record your time entries, you can also quickly find information such as what you were doing on a given day, how much time you have spent on a file since a given date, a list of time entries related to a file plus more.





To search your time entries, click the Search tab or choose Find from the Edit menu. A window then appears in which you can specify your search criteria.

Specify the criteria for the time entries you wish to find using the checkboxes and fields provided.



To search by date:

Click the "Whose date is" checkbox. In the drop-down list, choose the range to search (exactly, since, before, or between). Click the  button and choose the desired date in the mini-calendar. If you choose "between" from the drop-down list, choose the start and end dates by clicking the  buttons.


To search by file type:

Click the "Whose type is" checkbox, then choose the desired file type from the drop-down list.


To search by the text of activity descriptions:

Click the “Whose activity description contains” checkbox, then type the text to search for in the box provided.

To search time entries on a particular file:

Click the “Where” checkbox. Choose “file” from the drop-down list. Then click the  button. In the list of files that appears, locate and double click the desired file.

To search time entries involving a particular client:

Click the “Where” checkbox. Choose “client” from the drop-down list. Then click the  button. In the list of contacts that appears, locate and double-click the desired client.

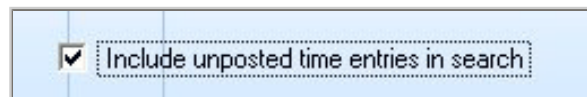
To search by file category:

Click the “Where” checkbox and choose “file category” from the drop-down list. Then, in the second drop-down list, choose the desired file category.

To search by activity code:

Click the “whose activity code is” checkbox, then choose the desired activity code from the drop-down list.

You can choose to include unposted time entries in your search as well by simply clicking on the “include unposted time entries in search” checkbox.



Include unposted time entries in search

Click the Search button once you have finished specifying the search criteria. A list of time entries that meet your search criteria will be displayed. You will also be able to see the number of time entries in the list as well as the total time spent.

The total time found is multiplied by the billable rates on the time entries found in the search, giving you an approximate monetary value for the time found. A monetary value calculation is very useful when a client calls and wants to know a ballpark figure for his/her account.

Note: The search results do not include any matters recorded outside Amicus Attorney – for example disbursements – and therefore should not be relied on as accurate final totals.

YOUR LEGAL LAUGH

Your monthly dose of humor...

Stu's Views

© 2002 Stu All Rights Reserved www.stus.com



"guilty... not guilty... guilty... not guilty..."

Compliments of: www.legalhumor.com.

4. Legal Tips

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



Continued from the June 2004 Issue

'Ask Clients To Prepare An Attorney Report Card? Are You Crazy?'

By Nancy Byerly Jones

This article, which was originally published in the Nov. 25, 2002 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.

Types Of Client Surveys

Client surveys can be developed by attorneys and their employees or by outside public relations or management consulting firms. Likewise, they can be analyzed in-house or by more scientific means.

They can be conducted through telephone or office consultations or by written surveys. Some firms regularly include postcards in their client statements which request responses to one or two "How are we doing" types of questions (i. e. "Are your calls returned promptly? Are there any legal services you need that we do not offer?"). They ask clients to enclose their completed postcard surveys with their payment when sent (which you hope will be in the very near future).

Client Survey Options On A 'Shoestring Budget'

Client surveys can be costly, but they do not have to be. Below is a sampling of some fairly inexpensive methods for collecting client feedback:

1. Questionnaires (given to clients while their case is active and at the time of closing their file)
2. Telephone surveys: (a) at random with select clients; (b) scheduled quarterly calls; (c) every client call (ask a different question every week such as: "When you call our office, do you always receive a courteous and professional greeting?"). All telephone feedback obtained by attorneys and staff should be entered into a specified database or word processing file for review and evaluation.
3. Internet surveys (e-mail, website feedback forms, etc.).
4. Postcards (alone or enclosed with other mail to client).
5. Focus groups (invite a small group of people from your community to a brainstorming session on what clients expect from their attorneys).
6. A dedicated voice-mailbox "hotline" for client concerns & suggestions.
7. Suggestion/idea box or basket placed in reception area.
8. Client interviews conducted by an outsider (a retired partner or judge, contract attorney).
9. A support staff person trained to be alert and perceptive to client "cues": (a) remarks reflecting disgruntlement; (b) body language reflecting impatience, frustration, etc.
10. Exit interviews with departing employees and with ex-clients who have terminated the attorney/client relationship and sought other counsel.
11. Add survey questions to the firm's client intake form (e.g. "Why did you choose this firm? Upon your arrival, were you greeted promptly, professionally and courteously?")
12. Create a "Board of Personal Advisors" for occasional meetings to discuss how to serve your clients better (possible "board" members: business associates, friends, mentors, etc.)
13. Have all firm attorneys and other employees conduct daily "mini" self-audits. (Ask yourself: "Would you want to be a client of this firm knowing what you do about its people, the work ethic, organization and the firm's managers and leaders?")

Clients Are Our Best Judges

Who, besides our clients, can better tell us if the manner and quality of the services provided to them was satisfactory? While clients may lack the necessary know-how to critique the quality of an attorney's legal expertise, they are excellent judges when it comes to evaluating someone's interpersonal or people skills. For example, they need no legal training themselves to know the answers to the following:

- How they were treated by you and your staff;
- Whether they were kept informed of the progress of their case on a regular basis;
- How promptly their telephone calls were returned;
- The friendliness and courteousness with which their telephone calls were handled;
- If all procedures, documents and transactions were clearly and patiently explained to them; and
- Whether their needs and questions were addressed by the attorney in a respectful way (as opposed to a condescending or hurried manner).

Survey Considerations

Outlined below is a checklist of things to consider when developing the right client survey form and procedures for you and your office:

1. Will the survey be mailed or conducted by telephone or one-on-one interviews with clients (remember to consider time and objectivity factors in selecting the manner of surveying clients)?
2. Which clients should be targeted to participate in the survey (you will receive a broader range of feedback by including dissatisfied clients and/or persons with whom you have met, but who did not retain you)?
3. What types of information are you seeking from the survey (i.e. feedback regarding attorney/client relationships; staff/client relationships; specific areas of law or departments within the firm; client suggestions for expanding firm services and/or areas of law practiced, etc.)?
4. What types of other marketing related questions do you want to include such as finding out which factors and referral sources influenced clients to select your firm?
5. What types of questions should be used (open-ended, closed-ended or a combination of both)?
6. Should the survey offer an anonymous manner of responding (response rates are usually higher when there is a method provided for responding anonymously)?
7. Should you hire an outside consultant or public relations expert to assist in developing, distributing and evaluating the surveys?
8. If not, should a "Client Survey Team" of attorneys and staff be created to direct the survey's development, distribution and review of the evaluations?
9. What procedures have been established to ensure that changes agreed upon in response to the survey results are actually implemented (i.e. policies, procedures, improved and/or expanded services, expansion of areas of practice, etc.)?
10. What safeguards will be established to ensure that clients who identified themselves on the surveys have been thanked for participating and notified about what, if any, actions are being taken to address their concerns (e.g. "Thanks to your helpful suggestion, we have added additional reading lights in our reception area.").

The Bottom Line

Attorneys differ as to the manner of conducting surveys, which and how many clients they ask to participate in their surveys and what types of questions they include. The type of format chosen is very important and careful thought must also be given to the kinds of feedback information desired so that the questions are designed and written accordingly.

Regardless of the particulars of a survey, the vast majority of attorneys who have conducted client surveys generally agree they were well worth the time, effort and costs. They do not think that asking their clients for a report card of sorts is crazy, but instead they think other lawyers are crazy not to solicit client feedback. Of course, from a competitive standpoint, lawyers smart enough to ask for their clients' opinions should be thrilled that many of their competitors do not recognize the short and long-term values gained from client surveys.

A Few Final Pointers

When reviewing your client-generated "report card," it may help to put on an extra layer of imaginary thick skin, to turn off the ol' ego button and to throw any excessive defensiveness out the window.

This will help get you through any negative feedback received so that you keep an open mind and reap the benefits of being made aware of valid areas needing improvement.

If your survey method and content is developed in the right way, however, you will also be receiving positive feedback along with any "how to improve" suggestions. And, fortunately, no further explanation is needed when it

comes to explaining the joys and rewards from positive feedback.

Compliments of:

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Solo attorney and certified mediator Nancy Byerly Jones practices law, mediates and arbitrates cases. She also heads up a law office management consulting firm in the northwestern mountains of North Carolina, where she and her husband reside on their mountainside horse and donkey ranch. Nancy is a regular contributor to Lawyers Weekly USA. For more information, please visit www.nbjconsulting.com, call (828) 264-1448 or send an e-mail to nbj@nbjconsulting.com.

5. **FAQs - Frequently Asked Questions**

Our Customer Service Team Provides Answers to Some Common Technical Questions



Why are only contact names showing up in WordPerfect documents when using the Amicus Attorney Address book? *(Applies to Amicus Attorney V users wishing to take advantage of the Corel Address Book)*

If you are using WordPerfect 9 (or earlier) and are attempting to use the Amicus Attorney Address Book for adding Contact information to WordPerfect documents, the only Contact information that appears in the documents are Contact names.

Solution:

Perform the following procedure to have the desired Contact fields appear in your WordPerfect documents:

1. From Windows Explorer, open your Windows (or Winnt) folder, and locate and launch the Aa50.ini file.
2. Under the line, [Version], add the entry: ExtendedMAPIProperties=1.
3. From WordPerfect, select Tools > Address Book.
4. In the tree-structure listing of the CorelCENTRAL Address Book window, select MAPI > Amicus Attorney Address Book.
5. With the Amicus Attorney Address Book highlighted, select View > Columns.
6. From the Columns window, activate the checkboxes for the Contact fields that you would like to have appear in your WordPerfect documents, and click OK.

6. **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

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.
July 26 , 2004	9:00 am	TRN201 Amicus Attorney V - Basics Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
July 26, 2004	11:00 am	TRN202 Amicus Attorney V - 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
July 26, 2004	1:00 pm	TRN203 Amicus Attorney V - Document Assembly Merge information from Amicus Attorney into your documents while linking the document to a File for future reference	Web based
July 26, 2004	3:00 pm	TRN204 Amicus Attorney V - The Library Organize your research materials for easy retrieval, i.e., word processing documents, spreadsheets, websites, paid services.	Web based
July 26, 2004	5:00 pm	TRN205 Amicus Attorney V - 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
July 27, 2004	9:00 am	TRN206 Amicus Attorney V - 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
July 27, 2004	11:00 am	TRN207 Amicus Attorney V - 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
July 27, 2004	1:00 pm	TRN208 Amicus Attorney V – PCLaw Link 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

July 27, 2004	3:00 pm	TRN201X Amicus Attorney X – Basics Setting up People, Files and using the Calendar, Telephone & E-Mail features.	Web based
July 27, 2004	5:00 pm	TRN202X Amicus Attorney X – Advanced Calendar 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
July 28, 2004	9:00 am	TRN203X Amicus Attorney X – Document Assembly Merge information from Amicus Attorney into your documents while linking the document to a File for future reference.	Web based
July 28, 2004	11:00 am	TRN204X Amicus Attorney X – Library Organize your research materials for easy retrieval, i.e. word processing documents, spreadsheets, websites, paid services.	Web based
July 28, 2004	1:00 pm	TRN205X Amicus Attorney X – Communications 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

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

2004

Date	Event	Location
July 5-10, 2004	Mississippi State Bar Association Summer School and Annual Meeting For more information: www.msbar.org/summer_registration/ InTouch Business Consultants will be at this event. www.intouchbc.com	Sandestin Linkside Conference Center Sandestin, FL
September 21, 2004	TexLaw Management Booth #113 Amicus Attorney will be exhibiting from booth #113 at this regional event that will focus on technology, firm management and support services. For more information: www.lawcatalog.com/product_detail.cfm?affil=tx&productID=3772	Belo Mansion and Pavilion Dallas, TX
October 7-10, 2004	State Bar of California – 77th Annual Meeting & Exposition 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. For more informatio: http://www.calbar.ca.gov/state/calbar/calbar_home.jsp 2b1 Inc, Amicus Attorney Premier Consultants www.2b1inc.com	Monterey, CA

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