

# Amicus Attorney News

The Official Newsletter of Amicus Attorney

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2004

Volume 2  
Issue 10

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*Watch for Amicus Attorney at these events.*

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



Same architecture and interface as Amicus V with great new features and enhancements including a NEW Notes Module.



**UPGRADE NOW!**

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

## Law Technology News Awards

Voting is now in progress for the 2nd Annual Law Technology News Awards by American Lawyer Media. These awards will be presented at LegalTech New York on January 31, 2005.

Show your support for Amicus Attorney as your favourite Case/Practice Management Software (under 50 attorneys) and as your favourite Docketing and Calendaring Software by completing a nomination form.

Nomination forms are available online here:

<http://208.3.165.128/MarketingInfo/index>

LTN subscribers are eligible to vote and the form will only take a minute to complete. Voting ends November 1, 2004!

Thank you for your support.

## Legal Laugh

Your monthly dose of humor...

**SUBSCRIBE HERE**

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. They'll start receiving it monthly.

## 2. Spotlight On ...

Highlighting a Feature of Amicus Attorney

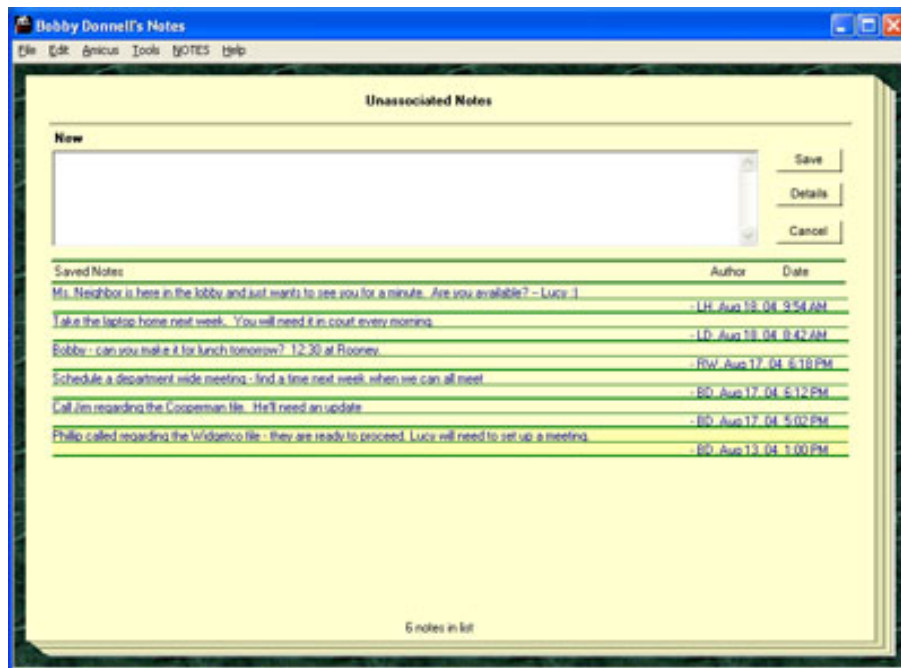


### The New Notes Module in Amicus Attorney V+

Record information instantly with this great new module now available in Amicus Attorney V+!

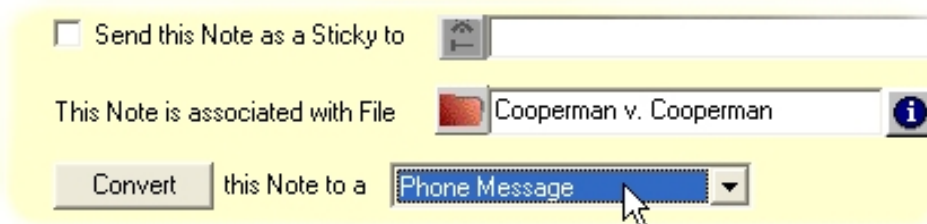
There is so much information that you must deal with in a day as a legal professional. No matter how organized you are, there are times when the information is flowing in so quickly that you only have time to quickly jot it down and move on to the next task. This is where the Notes module comes in handy.

The Notes module looks just like a legal pad and works like one too. You can record anything in the Notes module – a fact, a phone message, an action item etc.



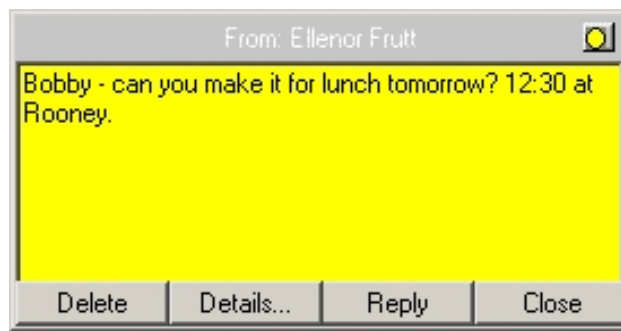
Want to put an item you have jotted down on a file? No problem. At any time, you can take any piece of information from your legal pad and transfer it, effortlessly, to a file. Lists of notes now appear on Files, making them a flexible (and dated) way of recording information.

Information you have jotted down may also have a more specialized purpose. You can convert your notes easily without having to re-type a thing. That hastily jotted down note can become a phone call, phone message, e-mail, time entry, to do or appointment with one click without you having to re-enter it. No re-typing. No transcription errors.



You will instantly eliminate all of the hand written sticky notes that are plastered around your desk when you start using the Notes module.

Send any items on the note pad as a "sticky message" within Amicus Attorney to other users in your firm.



You'll use the Notes module so much, that you'll wonder how you ever worked without it!

### 3. [Legal Tips](#)

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



#### **How Do You Achieve Excellence in Your Professional Practice?**

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

We are creatures of habit, and thus our habits define who we are. "Good habits are hard to develop but easy to live with. Bad habits are easy to develop but hard to live with," said one of the wealthiest men in America, Nido Qubein, speaking before an audience of consultants gathered at the Institute of Management Consultants conference in Nashville.

Qubein is also chairman of a bank, principle shareholder of Great Harvest Bread Company and has written 20 books. He listed 12 habits that will make you excellent as a professional, as well as bring you tons of business.

1. Every single day, call or write four clients or prospects. That's 20 people a week, 1,000 people a year. "I cannot tell you the power of this idea," he said. "Remember, if you are out of sight, you're out of mind."
2. Keep your desk clean. Treat every day as the day before a vacation. "Don't delay until tomorrow what you can do today."
3. Read one hour a day. "If you go to the bathroom five times a day, you've got time to read. He saves the morning paper for the evening. "I can wash down pretty much anything with a good glass of Merlot."
4. Ask yourself, "what did I do today to create new business?"
5. Pay yourself first. He's done this every day since he was 23 and was working 17 hours a day. Today he's 55 and this simple habit has created a fund that allows him to invest in other businesses.
6. Always work from the "is" and the "does" takes care of itself. What is your identity? How do you see yourself? Even when he was poor, he knew that poverty is a temporary status. "Wealth is a state of mind."
7. Don't work "slowly but surely," work slowly and cumulatively. It's the little things we do that amount to something worthwhile and add up to great relationships with clients.
8. Your success depends on the choices you make, not the circumstances you find yourself in. Nido said the greatest choice he's ever made was to become a transformational consultant, not a transactional consultant. The former not only solves the client's problem, but influences them in

measurable and lasting ways. "It's the difference from having insight and having impact."

**9.** Seek brand insistence, not mere brand preference. Simple preference is not enough. "Pepsi is branded in my mind, but I don't drink it," he said. All you need is a dozen clients who insist on using you. You want your clients to say, "I need you in my life." You can't be just nice to have around or someone who has some information clients need at the moment.

**10.** Don't make the grave error of seeking fame and not fortune. If you want fame, you can buy it. "I'd rather have eight clients who insist on having me than 1,000 clients who have heard of me," he said.

**11.** Every day when you go to sleep, ask yourself, "what did I learn today?" You should try to learn something new every single day. The more you know, the more you will be able to apply it to your practice.

**12.** Build your reputation. "If someone were to ask your clients behind your back, what would they say about you? Would they say you're a good guy but when you're gone they'll hire someone else?" When we know what our clients think about us, we truly know something valuable.

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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.**



## **You Have to Try This!**

*Practical Tips and Tricks from Amicus Attorney Certified Consultants*



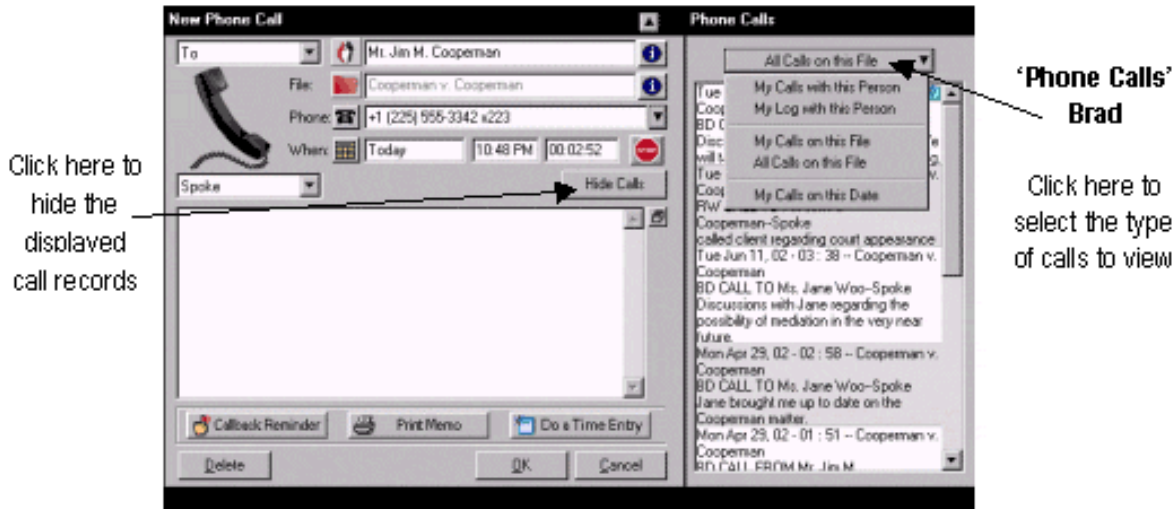
### **Viewing Details of Previous Calls & Using Callback Reminders**

*by Lori Berenson*

#### **Viewing Details of Previous Calls**

When initiating or receiving a phone call, you may find it useful to review previous phone calls with the same person or regarding the same file. With the Phone Call Details dialog box open, click the 'Show Calls' button under the 'Time' field to display: a) your phone calls with this contact, b) the related log with this person, c) your phone calls on this file, d) all calls on this file, or e) your phone calls on this date. The 'Show Calls' button then changes to a 'Hide Calls' button (as shown below).

Click here to show other call records → Show Calls

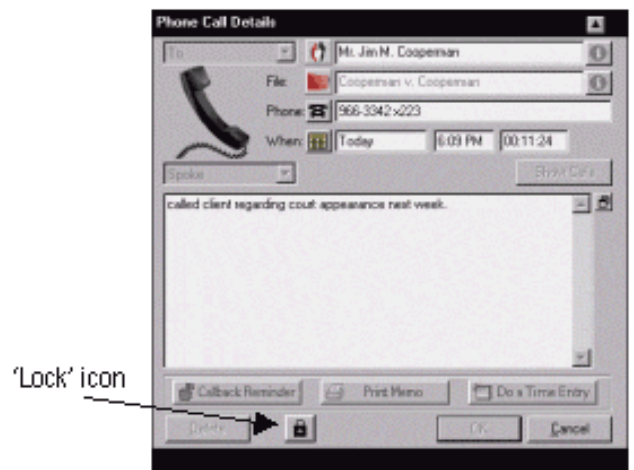


The log lists records of previous calls and messages, and shows basic information about each call or message. To view more details of a particular call or message, double-click on it from the 'Phone Calls' Brad. You may make any changes or just review the information. Click on OK to finalize the call record. Click on Cancel if you do not want to save the changes.

If you placed the call, then you can:

- edit the phone call details
- set up a Callback Reminder
- do a Time Entry
- print the call details

If another Team Member placed the call, most of the buttons on the window will be grayed out and there will be a 'Lock' icon at the bottom of the dialog box (as shown below). Then you are only able to view the call.



The 'Phone Calls' Brad heading allows you to select from the following list:



Brad Heading	Description
My Calls with this Person	Displays a list of all of your phone calls with this person
My Log with this Person	Displays a log of your phone calls and phone messages with this person (team environment only)
My Calls on this File	Displays a list of your calls with any contact associated with this file
All Calls on this File	Displays a log of all Team Members' file-related phone calls (team environment only)
My Calls on this Date	Displays a log of calls you have made on the date of the phone call

### Callback Reminders

When you leave a message for someone to call you, do you always remember to place a follow-up call if your call has not been returned? If you put the return call out of your mind (as many people do), the Callback Reminder will be a tremendous help to you. If you are placing a phone call, and a) the line was busy, b) there was no answer, or c)

you leave a voice mail message or a message with a live person, you can set up a Callback Reminder. A new To Do event is created - all you need to do is select the appropriate date to call the person back - either later that same day, the next day, or any time in the future.

When the  button appears on your To Do list, you have the following options:

- delete the To Do if the person has already returned your call and you have recorded the call
- if you **have** spoken to the person but haven't recorded the call, click on the  button, change to the appropriate date of the call, and log any notes about the call
- if you **have not** spoken to the person, click on the  button to initiate the new phone call.

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 owns and operates Productivity Consulting, a computer consulting firm based in Northeast Ohio.. Since 1985, Productivity Consulting have offered consulting and training to improve office productivity - specializing in contact and case management for law offices. Customized training manuals are offered with most of their training and consulting services, and can be tailored to fit the needs of clients.*



## **FAQs - Frequently Asked Questions**

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



**Why does the search seem to accept only one letter at a time when I type a File or Contact name while looking at the index?**

**Issue:** The Quicksearch, that allows you to type the first few letters of a File or Contact name in order to immediately go to that part of the list, jumps around from letter to letter as you type them.

**Cause:** There is an automatic timeout for the typing that is set to 0.5 seconds. If you type slowly, you will go beyond this half-second limit and Amicus will think you are starting a new search.

**Solution:** You can increase the typing timeout value by doing the following:

1. Close your Amicus Attorney office
2. Go to the Start button and select 'Run'
3. Type in AA50.INI and select 'OK' (for version 4, type AA40.INI)
4. Look through the file for the Keyboard Timeout preference in the [User Preferences] section
5. Change the setting from 500 to 2000 for 2 seconds.
6. Close and save the changes to the file
7. Start Amicus Attorney and try it out

For more time, go back into the AA50.INI file and increase the Keyboard Timeout again. The setting is in thousandths of a second so for n seconds, just enter in (n x 1000) as the number of seconds. Usually you don't need to go any higher than 5000 or 5 seconds.

**Versions:** Amicus Attorney Version 4 and V.

## YOUR LEGAL LAUGH

Your monthly dose of humor...



- "In the interest of streamlining the judicial process, we'll skip the evidence and go directly to sentencing."

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

## 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.

### **CD-ROM TRAINING**

#### **2b1, Inc.**

San Francisco, CA

(415) 284-2221

[www.2b1inc.com](http://www.2b1inc.com)

Amicus Attorney V Basic Training: PC Desktop training for the Amicus Attorney user. Easy-to use and easy-to-follow animation covers the most used features of Amicus Attorney V.

For more information, visit their web site:

[http://www.2b1inc.com/t\\_products.htm](http://www.2b1inc.com/t_products.htm)

### **WEB BASED TRAINING**

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

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

Special training on the new features in Amicus Attorney V+ now scheduled!

Date	Time	Training Session	Location
Flexible Dates	9:00 am 11:00 am 1:00 pm 3:00 pm 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.
November 1, 2004	9:00 am	<b>TRN201 Amicus Attorney V - Basics</b> Setting up Contacts, Files and using the Calendar, Telephone & Email features	Web based
November 1, 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
November 1, 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
November 1, 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
November 1, 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
November 2, 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
November 2, 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
November 2, 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
November 2, 2004	3:00 pm	<b>TRN201+ Amicus Attorney V+ NEW FEATURES</b> Including the Notes module virtual legal pad with ability to cross reference to files, enhanced sticky management, e-mail notification, Palm link enhancements, additional closed file options plus more.	Web based
November 2, 2004	5:00 pm	<b>TRN201+ Amicus Attorney V+ NEW FEATURES</b> Including the Notes module virtual legal pad with ability to cross reference to files, enhanced sticky management, e-mail notification, Palm link enhancements, additional closed file options plus more.	Web based
November 3, 2004	9:00 pm	<b>TRN201X Amicus Attorney X – Basics</b> Setting up People, Files and using the Calendar, Telephone & E- Mail features.	Web based

November 3, 2004	11:00 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
November 3, 2004	1:00 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
November 3, 2004	3:00 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
November 3, 2004	5:00 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 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/news/news\\_events.html](http://www.amicusattorney.com/news/news_events.html)

## 2004

Date	Event	Location
October 20-22, 2004	<p><b>Nebraska Bar Association 2004 Annual Meeting</b></p> <p>Exhibit Hall Hours: Wednesday Oct.20 &amp; Thursday Oct.21 - 8am - 5pm Friday Oct.22 - 8am - 3pm</p> <p>For more information on the annual meeting visit: <a href="http://www.nebar.com/memberinfo/calendar/annualmeeting/annualmeet.htm">http://www.nebar.com/memberinfo/calendar/annualmeeting/annualmeet.htm</a></p> <p>Client Server Technology Group(<a href="http://www.cstg.com">www.cstg.com</a>), Amicus Attorney Certified Consultants, will be exhibiting at this 104th Annual Meeting of the Nebraska State Bar. Stop by their booth for more information or a demonstration of Amicus Attorney.</p>	Hilton Hotel / Qwest Center Omaha, NE
October 22-24, 2004	<p><b>Juris Users International Group (JUIG) Conference</b></p> <p>Nex-Tek Inc., (<a href="http://www.nex-tekinc.com">www.nex-tekinc.com</a>) Amicus Attorney Certified Consultants will be attending this event.</p>	Nashville Airport Marriott Nashville, TN
October 29-30, 2004	<p><b>ALA Region 3 &amp; 4 Conference</b></p> <p>InTouch Business Consultants, LA, (<a href="http://www.intouchbc.com">www.intouchbc.com</a>) Amicus Attorney Premier Consultants, will be attending this educational conference and exhibition.</p> <p>For more information or to register: <a href="http://www.alanet.org/education/regconf/region34/index.html">www.alanet.org/education/regconf/region34/index.html</a></p>	Sheraton New Orleans Hotel New Orleans, LA

November 4-5, 2004	<p><b>Iowa Trial Lawyers Association Annual Convention</b></p> <p>Timely Office Solutions (<a href="http://www.timelyoffsol.com">www.timelyoffsol.com</a>), Amicus Attorney Certified Consultant, will be exhibiting at this event and conducting demonstrations of Amicus Attorney.</p> <p>For more information: <a href="http://www.iowatla.org/schedule.htm">www.iowatla.org/schedule.htm</a></p>	Embassy Suites Des Moines, Iowa
November 5-6, 2004	<p><b>ALA Region 1&amp; 2 Conference</b></p> <p>InTouch Business Consultants (<a href="http://www.intouchbc.com">www.intouchbc.com</a>) will be exhibitors at this ALA Educational Conference &amp; Exposition.</p> <p>For more information or to register: <a href="http://www.alanet.org/education/regconf/region12/index.html">www.alanet.org/education/regconf/region12/index.html</a></p>	Disney's Contemporary Resort Orlando, FL
November 6, 2004	<p><b>Maryland State Bar Association Solo and Small Firm Conference</b></p> <p>Booth, Shaberman &amp; Associates, Amicus Attorney Certified Consultants, will be at the conference conducting demonstrations of Amicus Attorney.</p> <p>For more information or to register for this event: <a href="http://www.msba.org/events/soloconf04/index.htm">www.msba.org/events/soloconf04/index.htm</a></p>	BWI Marriott Linthicum, MD
November 11-12, 2004	<p><b>Ontario Bar Association (OBA) Technology for Lawyers Conference and Vendor Expo</b></p> <p>Amicus Attorney will be exhibiting from Booth #17 at this 2 day conference and vendor expo. For more information on the conference or to register visit: <a href="http://ecom.lsuc.on.ca/html/cle/2004/CLE04-0110501.html">http://ecom.lsuc.on.ca/html/cle/2004/CLE04-0110501.html</a>.</p>	OBA Conference Centre Toronto, ON
November 11-12, 2004	<p><b>Oklahoma State Bar Annual Meeting</b></p> <p>For more information or to register, visit: <a href="http://www.okbar.org">http://www.okbar.org</a></p> <p>Progressive Computing &amp; Consulting, Inc. (<a href="http://www.progressivecc.com">www.progressivecc.com</a>) will be attending this event. Visit them for a demonstration of Amicus Attorney and to learn more about practice management software.</p>	Oklahoma City, OK
November 30 - Dec. 1, 2004	<p><b>Midwest Law &amp; Technology Conference &amp; Expo</b></p> <p>This year the Milwaukee Bar Association and the Chicago Bar Association have partnered to offer a two day, two city law &amp; technology expo. In addition to legal technology CLE, there will be an exhibit hall.</p> <p>November 30 – 8am - 5pm – Chicago, IL December 1 – 8am - 5pm – Milwaukee, WI</p> <p>Amicus Attorney is a Gold Sponsor of this event. Project Planning and Support, Inc (<a href="http://www.ppslegal.com">www.ppslegal.com</a>) will be on hand in Chicago and Ileene Levine will be in Milwaukee.</p> <p>For more information contact the Milwaukee or Chicago Bar Associations.</p>	The Conference Center / UBS Tower Chicago, IL  and The Wyndham Hotel Milwaukee, WI

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