Amicus Attorney V

Designed for use with QuickBooks® Pro & Premium Editions

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Overview

Amicus Attorney Advanced and Client/Server Edition users can integrate their data with QuickBooks. This dynamic link saves time and ensures consistency by not requiring data to be entered more than once. You can easily exchange File/Client information with Customer/Job information, File/Job Types, and Vendors. You can map Amicus Attorney Team Members to QuickBooks Employees, and take advantage of QuickBooks Class Lists. The link ensures that Amicus Attorney Activities and Billing Rates are available in QuickBooks. Once QuickBooks is installed on workstations from which Time Entries will be posted and the data-sharing feature is set up, those Team Members may post directly from Amicus Attorney.

Unlike the manual import/export template solution previously available in Amicus Attorney, this link sends Time Entries to QuickBooks as Time Entries and not as Invoices or Statements. It is essential that you follow the steps detailed to ensure a smooth flow of information between the two programs.

What you need

You will require the following to use the link:

- Amicus Attorney version 5.0.2 with QuickBooks patch or higher (Advanced Edition or Client/Server Edition only)
- QuickBooks 2002, 2003, or 2004 (U.S. Pro Edition or U.S. Premier Edition only)

Important: QuickBooks must be installed on the same computer as Amicus Administrator as well as each Team Member workstation that wishes to post Time Entries. Those Team Members should possess File system rights to read and write to the QuickBooks Company file.

What is Exchanged?

The link handles the dynamic exchange of several record types within the two programs. Some types of records are exchanged in both directions, while others are only sent from Amicus Attorney to QuickBooks. The following table illustrates the types of data exchanged and the direction of the Exchange:

Amicus Attorney	Exchange Direction	QuickBooks
Files AND Clients on File	←——→	Customer:Jobs
File Types	←——→	Job Types
Contacts in the "Vendors" Group	←——→	Vendors
Time Entries	——→	Time Entries
Billing Rates	——→	Service Items
Activity Codes	——→	Service Items
Location OR Timekeeper OR File Type OR Billing Category based on Preference setting	——→	Classes

In some instances the above noted records are filtered based on certain criteria such as their current status (i.e., Active v. Inactive). The following rules apply:

Files/Jobs:

- Only Amicus Attorney Active Files with an associated Client where the Responsible Lawyer is mapped to a QuickBooks Sales Rep will be exchanged.
- Only QuickBooks Active Jobs where the Sales Rep is mapped to an Amicus Attorney Timekeeper will be exchanged.
- Updates will not be sent over from Amicus Attorney where the Amicus Attorney File is Active and the QuickBooks Job is Inactive. Therefore, changes must be manually input.
- Updates will be sent over from QuickBooks to Amicus Attorney where the QuickBooks Job is Active and the Amicus Attorney File is Closed.
  Note: The Amicus Attorney File Status will not change from Closed to Active.
- Updates to some fields are not supported in QuickBooks. See Field Mapping for details.

Vendors:

- Only QuickBooks Vendors marked "Active" will be exchanged.
- Only Amicus Attorney Vendors belonging to the "Vendors" Contact Group will be exchanged.

File Types/Job Types:

- Only QuickBooks Job Types marked "Active" will be exchanged.
- Updates are not supported.

Activities/Services Items:

- Activities that do not exist as Service Items in QuickBooks will be added.
- Any Service Item that matches an Activity will not be updated, as this function is not supported in QuickBooks. Therefore, changes must be manually input.

Billing Rates/Service Items

- Billing Rates that do not exist as Service Items in QuickBooks will be added.
- A "parent" Service Item for the Amicus Attorney Timekeeper will be created in QuickBooks, with "Subitems" created for each Billing Rate.
- Any Service Item that matches a Billing Rate will not be updated, as this function is not supported in QuickBooks. Therefore, changes must be manually input.

Classes:

- Selected record type information (Location or Timekeeper or File Type or Billing Category) that does not exist in QuickBooks will be added.
- Updates are not supported.

Time Entries:

- Selected Time Entries are posted from Amicus Attorney to QuickBooks from the Team Member Workstations.
- Updates to Time Entries already posted to QuickBooks are not supported. Revisions must be made directly in QuickBooks.

What is Mapped but not Exchanged?

The following record types are mapped through Amicus Attorney rather than exchanged:

Amicus Attorney	QuickBooks
Team Members *	Employee List
Responsible Lawyer	Rep List
Preference setting	Accounts: Fee Income
Preference setting	Company File

* Team Member mapping requires that values already exist in both applications. Mapping facilitates differences in naming conventions.

Important: All QuickBooks Employees mapped to Amicus Attorney Team Members must also appear in the Sales Rep List in QuickBooks. For details, please see the section, Assigning QuickBooks Sales Reps to Customers, later in this document.

About Files/Clients and Customers/Jobs

A Customer in QuickBooks is the equivalent of a Client on an Amicus Attorney File, and a Job in QuickBooks is the equivalent of an Amicus Attorney File. These records are exchanged in both directions.

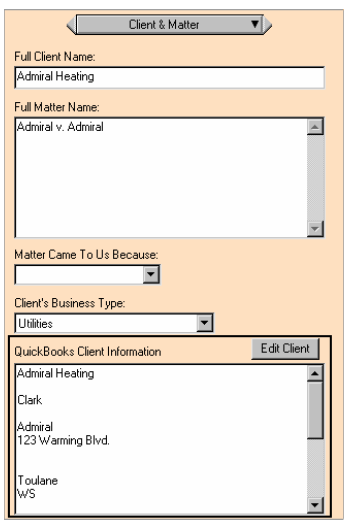
New Files opened in Amicus Attorney are created in QuickBooks, and vice versa. An Exchange also handles updates to Files/Clients already Exchanged with Customer:Jobs. Note that following Initialization, any new and changed Files and Client information are always sent first from Amicus Attorney; then new and changed Customer:Jobs are sent from QuickBooks.

Not all Files and Customer:Jobs are included in the Exchange. For details, see the section, What is Exchanged? For details on how fields are mapped during the Exchange and which fields are updated, see the section, Field Mapping.

Record deletions are not supported in the link. Deletions must be done manually in both applications.

Amicus Attorney Files/Clients

During Initialization, your Amicus Attorney Files will be updated to include a QuickBooks Client Information field in place of the Other field on the Client & Matter brad. On existing Files, this field will be automatically populated with the Contact information for the Client assigned to the File. (If there is more than one Client assigned to the File, the first Client will be used, but can be changed manually through the QuickBooks Client Information dialog.) This is the Client data that will be exchanged with your QuickBooks Customer information. The actual Amicus Attorney Contact card for this Client is not updated unless you choose to do so on an individual basis through the QuickBooks Client Information dialog. Assigning a Client to a new File created in Amicus Attorney will also cause this field to be populated with Client information.



New Files created during the Exchange will assign the QuickBooks Rep as the Responsible Lawyer, and also assign that Responsible Lawyer's default Team Members on new Files in accordance with their own Preference setting.

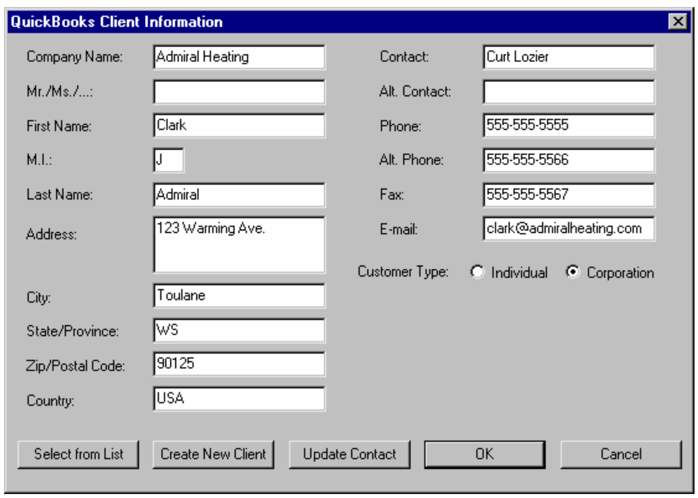
About the QuickBooks Client Information dialog

In the Client Information dialog, Client Information can be entered manually or may be modified:

- During Initialization for all new and existing Files.
- During an Exchange when new Files are sent over from QuickBooks or existing Client information is updated.
- When new Files are opened in Amicus Attorney.

The Client information is Exchanged directly with the corresponding QuickBooks Customer:Job record. The actual Amicus Attorney Contact card for this Client is not updated unless you choose to do so on an individual basis through the QuickBooks Client Information dialog. See the section below, Updating Client/Contact Information.

From the Client Information dialog you may select another Client on the File to be exchanged with QuickBooks, create a new Amicus Attorney Client/Contact based on the existing Client information, and update the existing Amicus Attorney Client/Contact information.



➢ **To access the QuickBooks Client Information dialog:**

1. From the Amicus Attorney File, select the Client & Matter brad.
2. From the QuickBooks Client Information field, click the Edit Client button.

   The QuickBooks Client Information dialog appears. See the topics below for information on selecting, creating, or updating a Client/Contact.
3. Any changes made to the QuickBooks Client Information dialog will be reflected in the Address Information tab of corresponding QuickBooks Job record the next time information is Exchanged.

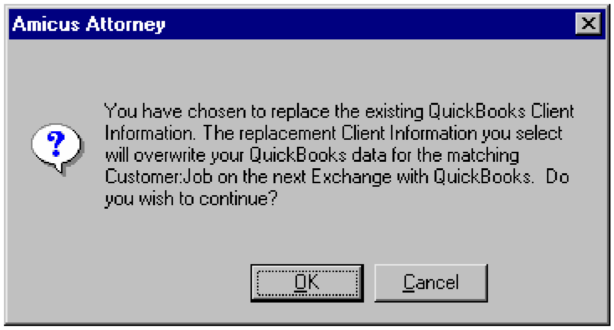
Selecting another Client

If another Client is assigned to the same File, you may select that Client's information to replace the existing Client Information that is Exchanged with QuickBooks.

➢ **To select another Client on the File to be Exchanged with QuickBooks:**

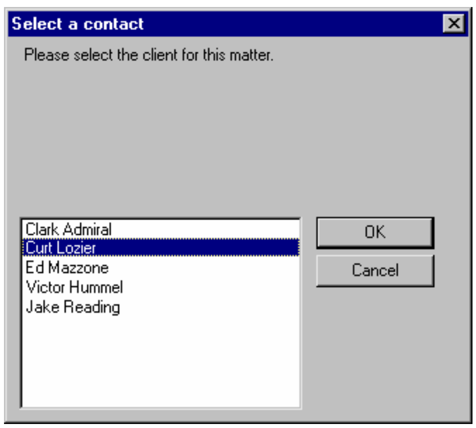
1 From the QuickBooks Client Information dialog, click the Select from List button.

The following prompt appears:



2 Click OK to continue.

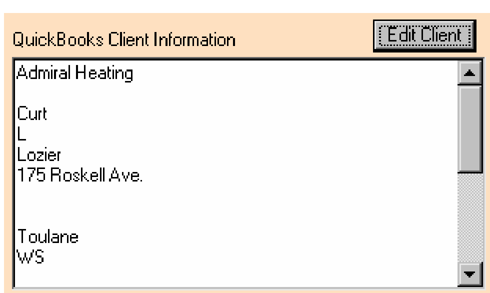
The Select a Contact dialog appears.



3 Choose the Client whose name and contact information you wish to Exchange with QuickBooks, and click OK.

4 From the QuickBooks Client Information dialog, click OK.

The selected Contact information is assigned to the QuickBooks Client Information field.



The next time you Exchange information through Amicus Administrator, the Client you have selected will replace the Customer information in the Address Information tab of the corresponding QuickBooks Job record. Please note that the QuickBooks parent Customer record will not be updated.

Creating a New Amicus Attorney Contact based on the Client Information

Because the Exchange of Client data only occurs between the Client Information field and QuickBooks, you may wish to add the Client to the File, and create a new Amicus Attorney Contact (if required) from the Client Information dialog.

➢ **To create a new Amicus Attorney Contact and assign the Contact as a Client on the File based on the information in the Client Information dialog:**

1 Click the Create New Client button.

The following occurs:

- Amicus Attorney runs a check to ensure that a duplicate Contact does not already exist.
- All Team Members assigned to the File are automatically assigned to the Contact.
- The Contact is assigned to the "Client" Contact Group.
- The primary Contact card is set according to whether the Client is an Individual or Corporation (i.e., if the Client is an Individual, the Home card is set; if the Client is a Corporation, the Office card is set).
- "Client" is chosen as the File association (i.e., "On this File this Person is a: Client"), and the Client is specified as an Individual or Corporation on the File.

2 Click OK in the QuickBooks Client Information dialog.

Updating Client/Contact Information

Any updates made to the Client Information dialog are not automatically reflected in the matching Amicus Attorney Contact record.

➢ **To update your Client/Contact information in Amicus Attorney:**

1 Click the Update Existing Client button.

2 You are prompted that this Contact exists and asked whether you wish to update this Contact. Click Yes.

3 Click OK in the QuickBooks Client Information dialog.

QuickBooks Customers/Jobs

Although QuickBooks allows you to enter Matter (Job) information in your Customer record, the link will not support this configuration. All Matter information must be separated from your Client (Customer). For further details, see the section, Moving Jobs out of the Customer Records.

The naming convention you have chosen for your Customer:Jobs in QuickBooks will affect field mapping and should be taken into account when checking data consistency. You may have chosen to identify your Customer:Jobs by Client ID and Matter ID, or by Client Name and Matter Name. For more details, see the following section, Customer:Job Naming Conventions. It is important that your General option settings properly reflect your naming convention.

In Amicus Attorney, Clients can be designated as an “Individual” or a “Corporate” entity on the File. In order to handle this designation in QuickBooks, these values are added to the Customer Type List during Initialization.

Note on Customer:Job Addresses: If you experience problems related to exchanging address information, you will need to open the QuickBooks Customer:Job record, and ensure that the address information items (i.e., Address, City, State/Province, Zip/Postal Code) reside in their proper fields in the Edit Address Information dialog. See the Troubleshooting section later in this document for details on verifying your address information in QuickBooks.

Customer:Job Naming Conventions

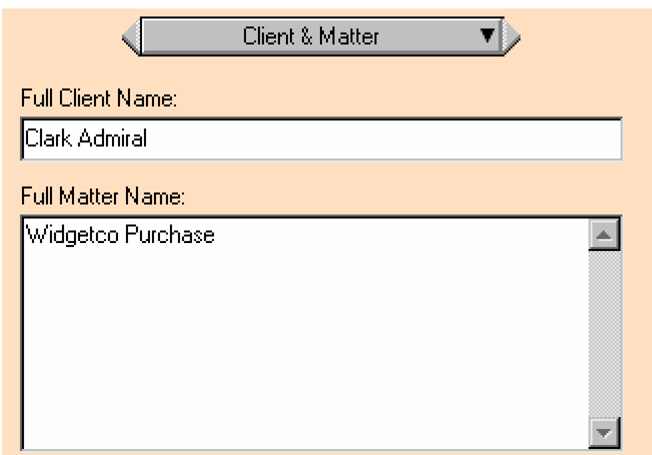
Field assignments for exchanging Files are dependent on whether you identify your Customer:Jobs according to Client ID:Matter ID or Client Name:Matter Name. It is important that your General option settings properly reflect the naming convention you use in QuickBooks, and that all records use the same naming convention.

Important: You must ensure that Jobs are separate records and not part of the Customer parent record. For information, see the section, Moving Jobs out of the Customer Records.

Using the Client Name:Matter Name Convention

If you choose to identify Customer:Jobs according to Client Name:Matter Name, the Full Client Name and the Full Matter Name in the Amicus Attorney Client & Matter brad will be used to identify the Customer and Job in QuickBooks.

For example, the following illustrates an Amicus Attorney File with “Clark Admiral” assigned as the Full Client Name and “Widgetco Purchase” assigned as the Full Matter Name:



Upon Exchange, “Clark Admiral” will be created as the corresponding QuickBooks Customer and “Widgetco Purchase” will be created as the corresponding QuickBooks Job:

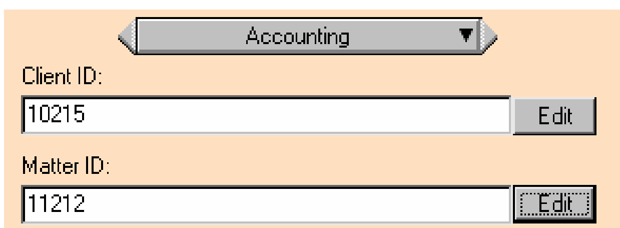
During Initialization, matches will be identified based on the Amicus Attorney Full Client Name and Full Matter Name compared with the QuickBooks Customer:Job Name.

Note: If the Full Client Name field is empty in Amicus Attorney, then the first Contact designated as a Client on the File will be assigned. (If the Client is a corporation then the Company Name will be assigned; if the Client is an individual, then the First, Middle, and Last Name will be assigned.) If the Full Matter Name field is empty in Amicus Attorney, then the Short File Name will be assigned.

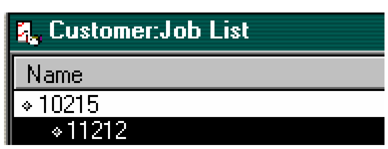
Using Client ID:Matter ID Convention

If you choose to identify Customer:Jobs according to Client ID:Matter ID, the Client ID and Matter ID in the Accounting brad of your Amicus Attorney File will be used to identify the Customer and Job in QuickBooks.

For example, the following illustrates an Amicus Attorney File with a Client ID of “10215” and a Matter ID of “11212”:



Upon Exchange, “10215” will identify the corresponding QuickBooks Customer and “11212” will identify the corresponding QuickBooks Job:



About File Types

File Types in Amicus Attorney are exchanged bi-directionally with Job Types in QuickBooks. File Types can also be used to track Classes.

File Types in Amicus Attorney are created in a simple one-level list, whereas, QuickBooks supports multiple levels of Job Types.

For example, in QuickBooks you could have a multi-level Job Type of Real Estate with a subitem of Residential with a further subitem of Condominium. This would be displayed in QuickBooks lists as follows:

Upon Initialization or Exchange, this QuickBooks Job Type would be created in Amicus Attorney with the name "Real Estate:Residential: Condominium". It is highly recommended that multi-level File/Job Types be originated from QuickBooks in order ensure that hierarchical parent records are properly identified. See the Important Note in the section, Using QuickBooks Classes, regarding hierarchical records if File Types are tracked under Classes.

It is important to remember that File Types in Amicus Attorney determine the custom fields that will be available on the File. Changing a File Type should be done with caution.

Not all File Types and Job Types are included in the Exchange. For details, see the section, What is Exchanged? For details on how fields are mapped during the Exchange and which fields are updated, see the section, Field Mapping.

Deletions and updates to File Types are not supported in the link. Changes and deletions must be done manually in both applications.

About Vendors

When you are configuring your Exchange options, you may select an option that will enable you to bi-directionally exchange QuickBooks Vendors with Amicus Attorney Contacts who have been assigned to a Contact Group containing the word "Vendors". All Contacts who are designated as Vendors in Amicus Attorney will be exchanged with Vendors on the QuickBooks Vendor list.

Not all Vendors are included in the Exchange. For details, see the section, What is Exchanged? For details on how fields are mapped during the Exchange and which fields are updated, see the following Field Mapping section.

Record deletions are not supported in the link. Deletions must be done manually in both applications.

Important: The QuickBooks Vendor name should always match the QuickBooks Company Name and/or First/Last Name. This will ensure that duplicates are not created when you Exchange information.

About Team Member Assignments

When Exchanging information with QuickBooks, Team Members are assigned to the following records in Amicus Attorney:

- New Files
- New Contact records for Clients on Files
- New Contact records for Vendors

How Team Members are assigned to a new Amicus Attorney File created from an Exchange is dependent on the Responsible Lawyer assignment for that File: When you create a new Customer:Job in QuickBooks and Exchange information with Amicus Attorney, the QuickBooks Rep assigned to the Customer:Job will become the Responsible Lawyer on the new File created in Amicus Attorney. Those whom the Responsible Lawyer has chosen to be assigned by default in his or her Preferences will determine the Team Members assigned to the new File. For example, if Heather Gavel has pre-assigned Bobby Donnell and Elaine Wassal to be the default Team Members on new Files in her Preference settings, they will be automatically assigned to all new Files created upon an Exchange for which she is the Rep/Responsible Lawyer.

Customers in QuickBooks are the equivalent of Clients on Amicus Attorney Files. Therefore, when a File is created in Amicus Attorney upon Exchanging information, the Customer for the Job in QuickBooks becomes the Client on the File in Amicus Attorney. Team Members on a File are automatically assigned to the Contact records for all parties on the File. For example, if the Team Member Bobby Donnell is assigned by default to a File that has Matthew Alladin added as a Client on the File, Bobby Donnell will be also be assigned to Matthew Alladin's Contact record.

If you selected the option for exchanging QuickBooks Vendors with Amicus Attorney Contacts who have been assigned to the "Vendors" Contact Group when you configured your Exchange options, ALL Amicus Attorney Team Members will automatically be assigned to Vendor Contacts created upon an Exchange.

About Time Entries

Time Entries in Amicus Attorney are exchanged with QuickBooks in one direction - from Amicus Attorney to QuickBooks. Time Entries, unlike other data exchanged with QuickBooks, are sent through the Posting function in the Time Sheets module at each individual workstation and not through the Exchange function in Amicus Administrator. This model will maintain the law firm workflow within which lawyers are accustomed to working. It allows the lawyer to be confident that the Time Entries will not be billed until they are finalized.

Both Billing Rates and Activities are exchanged in one direction from Amicus Attorney to QuickBooks Service Items. This ensures that the proper Rate is applied to Time Entries posted to QuickBooks from Amicus Attorney under various scenarios:

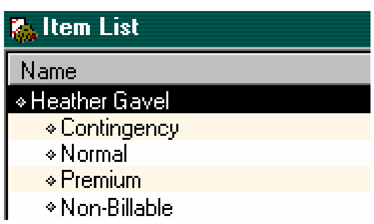
- The Service Item for the Timekeeper's Billing Rate specified in the Time Entry will be applied and the duration is Exchanged.
- Non-billable Time Entries can be sent from Amicus Attorney to QuickBooks. They will be created in QuickBooks with reference to the Timekeeper's Non-Billable Service Item and with the Billable checkbox unchecked and the duration is Exchanged.

- If the Timekeeper's Billing Rate is a Contingency Rate, then a Non-billable Contingency Service Item is applied in QuickBooks, and the duration is Exchanged.
- If the Amicus Attorney Time Entry's Billing Rate is a Flat Rate, then a search is performed for a corresponding Service Item upon Exchange. If no corresponding Service Item exists for the Flat Rate, then a Service Item is created with the name "Flat Rate - [value]", and the duration is set at 1 hour.
- If the Amicus Attorney Time Entry's Billing Rate is an Other Rate, then a search is performed for a corresponding Service Item upon Exchange. If no corresponding Service Item exists for the Other Rate, then a Service Item is created with the name "Other Rate - [*value*]", and the duration is Exchanged.

About Billing Rates and Service Items

Billing Rates in the link are exchanged in one direction only - from Amicus Attorney to QuickBooks Service Items. This is to ensure that any Billing Rate used in an Amicus Attorney Time Entry will exist as a Service Item in QuickBooks. A Service Item parent record will be created during Initialization or Exchange for each Timekeeper, if one does not already exist, with Subitems for each Billing Rate, including Non-billable and Contingency. For example, the Amicus Attorney Timekeeper, "Heather Gavel", is matched with the QuickBooks Service Item (parent item) of the same name*, and the Amicus Attorney Billing Rates belonging to that Timekeeper for each Billing Category (i.e., "Normal", "Discount", etc.) are matched with the QuickBooks Subitems of the same names.

The following illustrates how the Timekeeper and Billing Rates appear as a Service Item and Subitems, respectively, in the QuickBooks Item List:



* Please note that the Amicus Attorney Timekeeper is matched with the QuickBooks Service Item (parent item) according to the Mapped Name. No rate or description is required for the parent record.

Important: Deletions and modifications to Billing Rates are NOT supported in the link. All modifications and deletions must be performed manually in both applications.

About Activities and Service Items

Non-billable Time Entries can be sent from Amicus Attorney to QuickBooks. This will allow QuickBooks users access to Amicus Attorney Activities through the QuickBooks database.

Amicus Attorney Activities can be created on multiple levels, and it is important to note that QuickBooks only supports up to five (5) levels of Service Items.

A match will occur only if the Activity Name in Amicus Attorney and Group Name (or other subitem name, where applicable) matches the QuickBooks Service Item Name and the “Subitem of” the parent name(s), where applicable. For example, a new Activity of “Exchange Voice Mail” under the “Telephone” Activity Group in Amicus Attorney will be created in QuickBooks, only if the parent level “Telephone” already exists in QuickBooks.

The best views for comparing your current records is through the QuickBooks List Window and the Configure > Time Sheets dialog in Amicus Administrator, or from a printout of the information from each program.

Deletions and updates to Activities are not supported in the link. Changes and deletions must be done manually in both applications.

The maximum number of allowable characters for the name of a QuickBooks Service Item is 31. If the name of an Amicus Attorney Activity exceeds this number, the Service Item will appear truncated in QuickBooks upon Initialization or Exchange, and may result in a non-unique Service Item being sent over. All Service Item Names must be unique in QuickBooks.

UTBMS Task and Activity Codes are currently not supported.

Using QuickBooks Classes

Those users who take advantage of Classes in QuickBooks for purposes of tracking different segments of their business and breaking down income and expenses for each segment, can carry that tracking ability through to Time Entries that are posted from Amicus Attorney. This will ensure a more accurate analysis of your business practices. Classes should only be used for tracking one area.

If you intend to activate the Amicus Attorney option for tracking Classes when you are configuring your General option settings, Class tracking must first be enabled in QuickBooks.

You have the choice in your Setup options of tracking one of four areas:

- Location
- Timekeeper
- File Type
- Billing Category

This option will cause your selected data type to populate the Class field of all Time Entries sent from Amicus Attorney to QuickBooks. For example, if you chose Fee Methods, then the Billing Category for the Time Entry would be included.

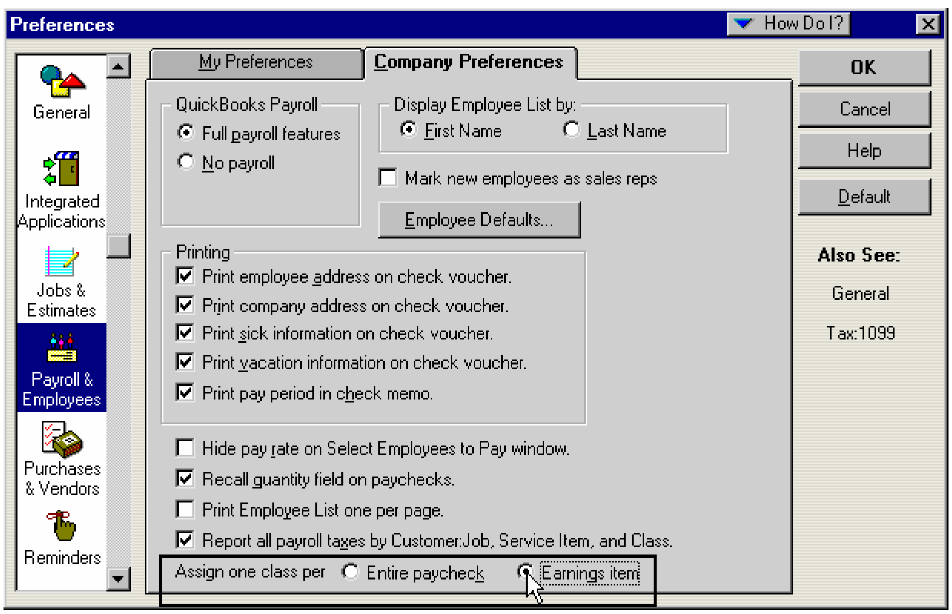
Each of these four types of Amicus Attorney records are created in a simple one-level list, whereas QuickBooks supports multiple levels of Classes. Therefore, any new Classes created in QuickBooks through the link will be added as non-hierarchical records.

The exchange of Class List values will be one-way from Amicus Attorney to QuickBooks based on your General option settings. For more details on how fields are mapped, see the Field Mapping section.

Deletions and updates to Classes are not supported in the link. Changes and deletions must be done manually in both applications.

Important Note if Files Types are Chosen: Files Types are also exchanged in both directions with QuickBooks Job Types. If your Job Types are hierarchical, they will be added in Amicus Attorney with each subitem name separated by a colon (:). This character is not supported by QuickBooks in Class List Names, and therefore hierarchical Job Types are not supported if they are also to be used in Class Lists.

In order for Classes to appear in your Time Entries, you need to open QuickBooks, select Edit > Preferences, choose Payroll & Employees, click the Company Preferences tab, and from the “Assign one Class per” option, activate the Earnings Item radio button.



Field Mapping

Amicus Attorney File/Client and QuickBooks Customer:Job

Amicus Attorney File	QuickBooks Customer:Job Fields	Amicus Attorney Contact (applies only to new Contact created via link) [1]
Client ID:Matter ID *or* Client Name:Matter Name [2]	Customer:Job Name	

Amicus Attorney File	**QuickBooks Customer:Job Fields**	**Amicus Attorney Contact (applies only to new Contact created via link)** [1]
Company Name [3]	Company Name [4]	Company Name
Prefix [3]	Salutation [4]	Prefix
First Name [3]	First Name [4]	First Name
Middle Name [3]	Middle Initial [4]	Middle Name
Last Name [3]	Last Name [4]	Last Name
Address [3]	Bill To Address (Street)	Street Address
City [3]	Bill To Address (City)	City
State/Province [3]	Bill To Address (State/Province)	State/Province
Zip/Postal Code [3]	Bill To Address (Zip/Postal Code)	Zip/Postal Code
Phone [3]	Phone	Home Phone *or* Company Phone
Alt. Phone [3]	Alt. Phone	Home 2 Phone *or* Business 2 Phone
Fax [3]	Fax	Home Fax *or* Business Fax
E-mail [3]	E-mail	Home E-mail *or* Business E-mail
Client Role on File [6]	Customer Type Reference [5]	
Responsible Lawyer [6, 7]	Rep	
File Status [6]	Job Status	
File Open Date 6	Job Start Date	
File Status: “Active” 6	Active	
File Type [6]	Job Type Reference	

1 – This column only applies to *new* Contacts created in Amicus Attorney during Initialization or Exchange, and is dependent on the QuickBooks Customer Type. If the Customer Type is Individual, then Address and Communication items will be assigned to the Home Card of the Amicus Attorney Contact. If the Customer Type is Corporate, then Address and Communication items will be assigned to the Office Card of the Amicus Attorney Contact. If the Customer Type has not been specified, or if it is neither Individual nor Corporate, then the following rule applies: If the QuickBooks Company Name field is empty, Address and Communication items will be assigned to the Home Card of the Amicus Attorney Contact. If a name has been entered in the QuickBooks Company Name field, Address and Communications items will be assigned to the Office card. Please note that Amicus Attorney Contact cards are not *updated* during an Exchange with QuickBooks. Only the Client Information on the File is changed.

2 – Dependent on whether QuickBooks Customer:Jobs are set to be identified as Client ID:Matter ID or Client Name:Matter Name in your General options.

3 – These fields appear in QuickBooks Client Information field on Client & Matter brad of Amicus Attorney File.

4 – When Exchanging data from Amicus Attorney to QuickBooks, Name information is assigned to the Bill To Street Address field.

5 – Refers to entity designation: Individual or Company.

6 – Not updated on change.

7 – Based on Team Member Mapping. *See also:* About Team Member Assignments.

Amicus Attorney Contacts assigned to Vendors List and QuickBooks Vendors

Note: The following table applies if the Setup option has been enabled for exchanging QuickBooks Vendors with Amicus Attorney Contacts who have been assigned to the Vendors Contact Group.

Amicus Attorney Contact in Vendor Group	QuickBooks Vendor
Last/First/Middle Name and/*or* Company Name *	Name
Company Name (Office Card)	Company Name
Prefix	Salutation
First Name	First Name
Middle Name	Middle Initial
Last Name	Last Name
Office Address	Vendor Address
Business Phone 1	Phone
Business Phone 2	Alt. Phone
Business Fax	Fax
Business E-mail	E-mail

* If both the Company Name and First/Last Name fields are empty in QuickBooks, the Vendor Name is assigned to the Company Name field in Amicus Attorney.

Amicus Attorney Activities and QuickBooks Service Items

Amicus Attorney Activity	QuickBooks Service Item
Activity Name	Item Name/Number
Activity Group Name (if applicable)	Subitem of
Activity Rate Attribute Description *	Description
Activity Rate (if applicable)	Rate
Fee Income Account Name (as per Preference)	Account

* This refers to the type of Rate associated with the Activity.

Amicus Attorney Billing Rates and QuickBooks Service Items

Amicus Attorney Billing Rate	QuickBooks Service Item
Billing Rate Name	Item Name/Number
Timekeeper	Subitem of
	Description
Billing Rate	Rate
Fee Income Account Name (as per Preference)	Account

Before You Initialize

It is highly recommended that you take the time to understand the fundamental ways in which data sharing with QuickBooks works. See the section, "What is Exchanged".

Before performing the Initialization, there are some preliminary procedures you will need to do. The following is a checklist of these steps, each of which are fully detailed in this document.

1. Ensure data consistency between Amicus Attorney and QuickBooks.
2. In QuickBooks, assign QuickBooks Reps to every Customer whose Job information will be Exchanged with Amicus Attorney.
3. In QuickBooks, move Jobs out of Customer records.
4. In Amicus Attorney, select QuickBooks as your Accounting System.
5. In Amicus Attorney, configure your Setup options in Amicus Administrator.
6. In QuickBooks, configure your Integrated Application Preferences, if desired. For information, see the Recommendation in the topic, .
7. Back up your data in QuickBooks. **Note:** Backing up Amicus Attorney data is done automatically when you perform the Initialization.
8. In Amicus Attorney, perform the Initialization.
9. Configure individual Team workstations so that Team Members may access the QuickBooks Company File.
10. From the QuickBooks.txt log file, resolve any inconsistencies listed.
11. Once you have Initialized, you may Post Time Entries from Amicus Attorney to QuickBooks and Exchange information on a regular basis to ensure data is kept up-to-date.

Note: If you encounter difficulties while sharing data with QuickBooks, please consult the topics contained in the "Troubleshooting" section of this white paper.

Backing up your Data in QuickBooks

Before you set up the link, it is strongly recommended that you back up your data in QuickBooks before Initialization. For instructions, consult your QuickBooks documentation.

Note: There is no need to back up your Amicus Attorney data as this is done automatically when you perform the Initialization.

Ensuring Data Consistency

It is highly recommended that a data review be carried out prior to Initialization to ensure that data has been consistently entered in key fields in both applications. It is equally important that all Team Members understand the basics of how Amicus Attorney and QuickBooks match data based on the key fields and how the subitems within each of the applications affect the match criteria. The most basic underlying premise of the link is that if a match is not found in the other application, the record will be added. Therefore, data consistency is especially important for those types of records that are exchanged in both directions. Taking the time to check for data consistencies and making those Team Members who enter data aware of the link fundamentals, will help in eliminating duplicates from being created upon Initialization and subsequent Exchanges.

Assigning QuickBooks Reps to Customers

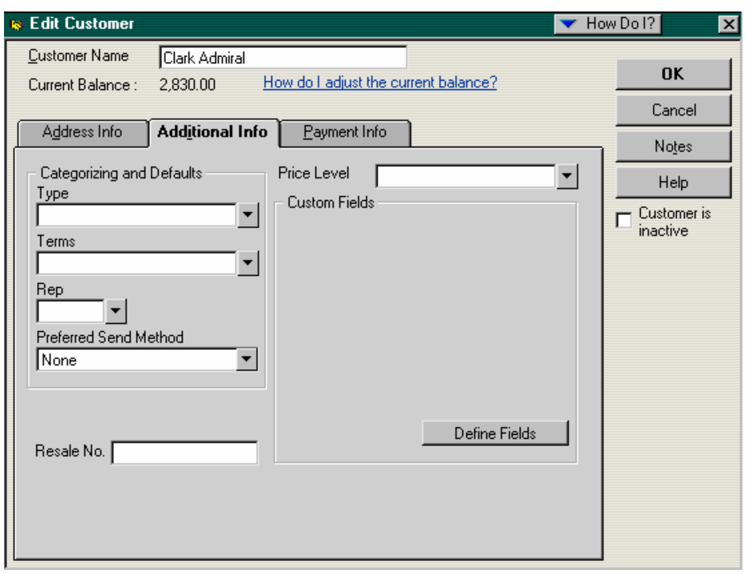
QuickBooks Employees specified as Reps on Customer records are the equivalent of Amicus Attorney Team Members assigned as Responsible Lawyers on Files. In order to assign a Rep to a Customer record, you must first set up the Employee as a Sales Rep.

There must be a Sales Rep who is mapped to an Amicus Attorney Team Member assigned to every Customer whose Job information is to be exchanged with Amicus Attorney.

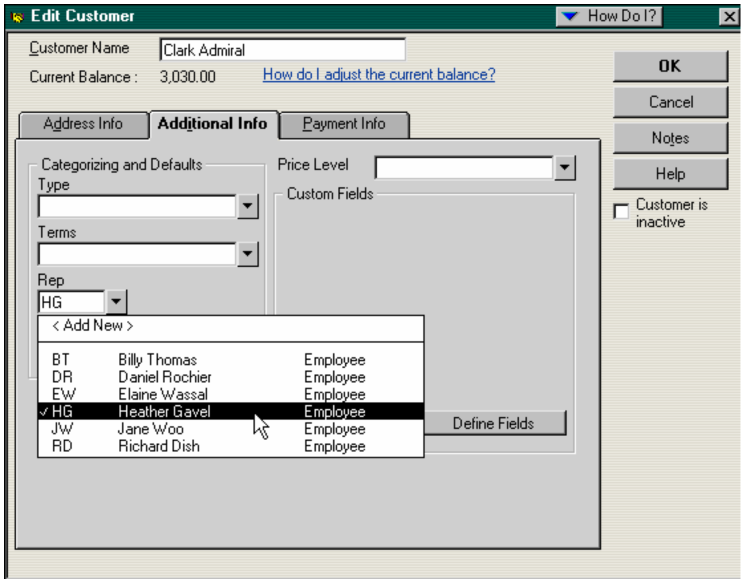
➢ **To add a Rep to a Customer in QuickBooks:**

1 From the Customer:Job List, double click on a Customer record to open it.

2 From the Edit Customer window, click the Additional Info tab.



3 Click the Rep drop-down, and select the Employee whom you wish to add as a Rep to the Customer.

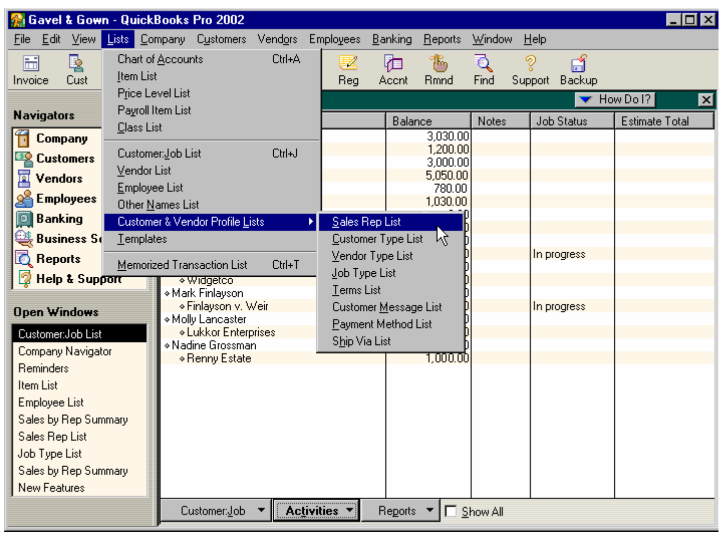


4 Click OK to save the Customer record.

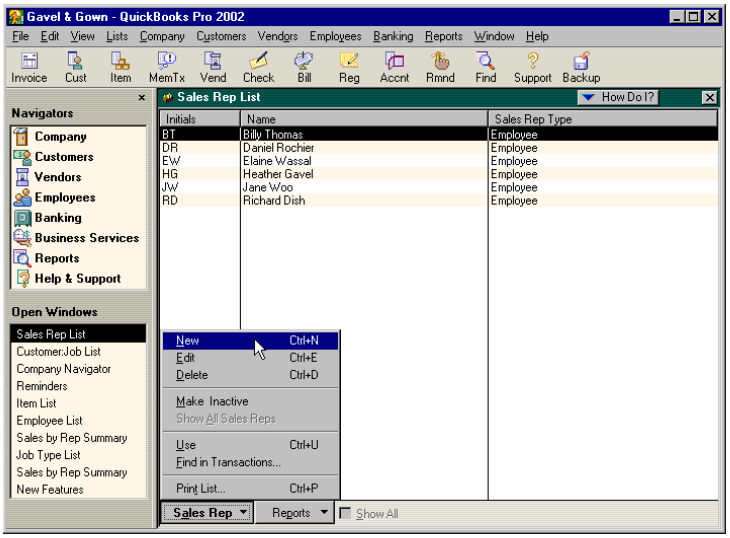
If your Employees have not been assigned to the Sales Rep List you will need to add them.

➢ **To add QuickBooks Employees to the Sales Rep List:**

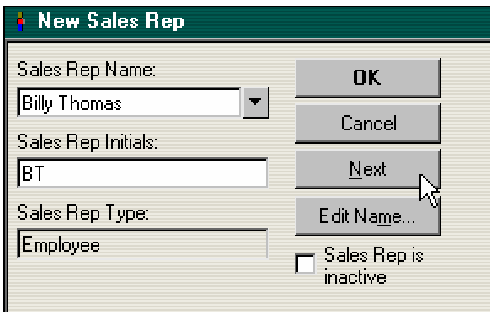
1 From the Lists menu, choose Customer & Vendor Profile Lists, and then choose Sales Rep List.



2 Click the Sales Rep button and select New.



3 From the Sales Rep Name field, click the drop-down, select an Employee name, and click Next.



4 After selecting the last Employee to be added as a Sales Rep, click OK.

All QuickBooks Employees added to the Sales Rep List may now be added to Customer records.

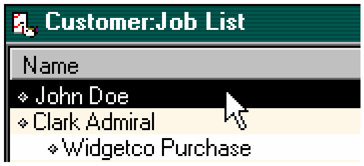
Moving Customer Jobs out of Customer Records

Jobs in QuickBooks cannot reside at the Customer record level, as QuickBooks does not support the addition of new Jobs to this type of Customer. All Jobs must appear listed beneath the Customer record in the Customer:Job List.

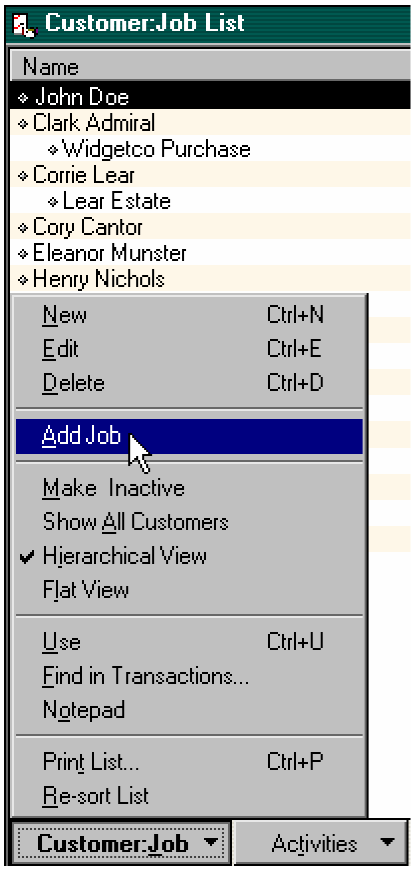
Before you Initialize the link, it is important that you manually separate Jobs from their respective Customer records in QuickBooks. If the link has already been Initialized, ensure that any newly added Jobs that reside at the Customer record level are separated before you exchange information.

➢ **To manually separate a Job from the Customer level and place it into the Jobs category:**

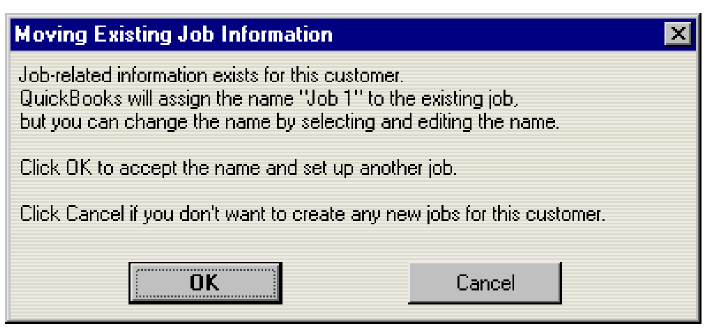
1 From the Customer:Job List in QuickBooks, highlight the Customer record in which Job information exists at the Customer level.



2 Select Customer:Job > Add Job.



The following prompt appears:

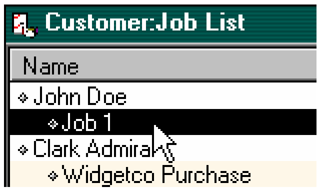


3 Click OK.

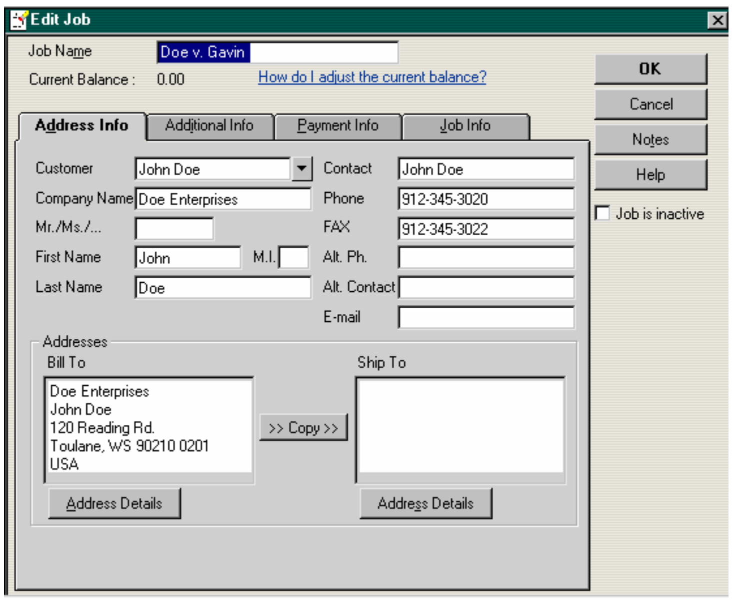
4 A New Job window appears. Click Cancel.

5 The Job information now appears in the Customer:Job List category below the Customer record displaying the default title, “Job 1”. **Note:** If you open the Customer record, you will see that there is no Job Info tab.

6 To edit the name of the Job record, double-click on the record to open it.

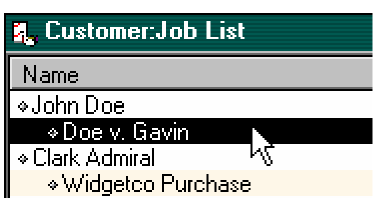


7 From the Edit Job window, enter an appropriate name of the Job in the Job Name field.



8 Click OK to save your Job information.

The proper Job name appears listed under the Customer record in the Customer:Job List.

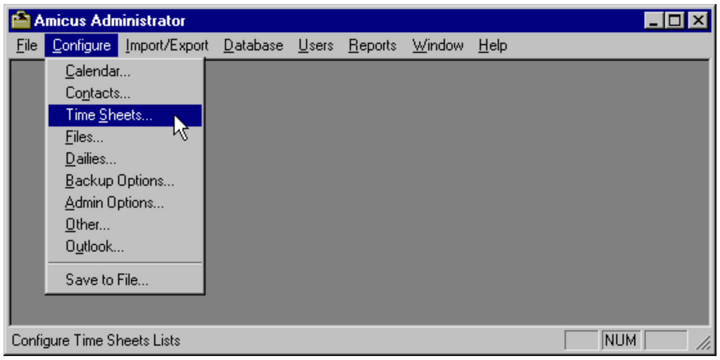


Selecting QuickBooks as your Accounting System and Configuring Setup Options

Important: Before you select QuickBooks as your accounting system, please ensure that QuickBooks is running.

➢ **To select QuickBooks as your accounting system:**

1 From Amicus Administrator, select Configure > Time Sheets.



2 From the Time Sheets dialog, click the Accounting System tab.

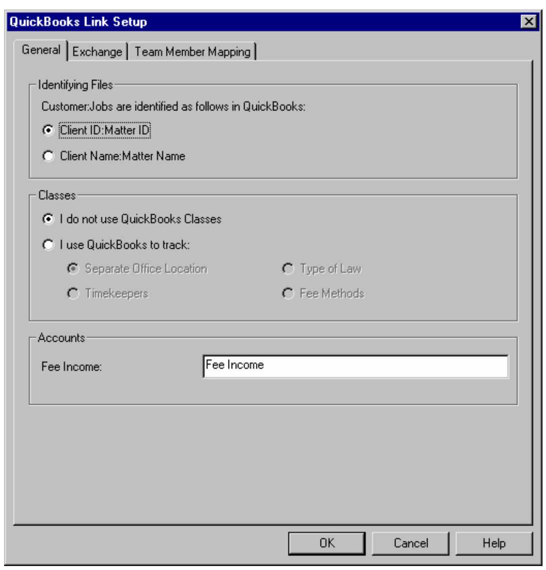
3 From the drop-down, select QuickBooks Link.

➢ **To configure your setup options:**

4 Click the Team Settings button to configure your settings.

The QuickBooks link setup dialog appears. It consists of three tabs: General, Exchange, and Team Member Mapping.

5 The QuickBooks link setup dialog opens to the General tab.



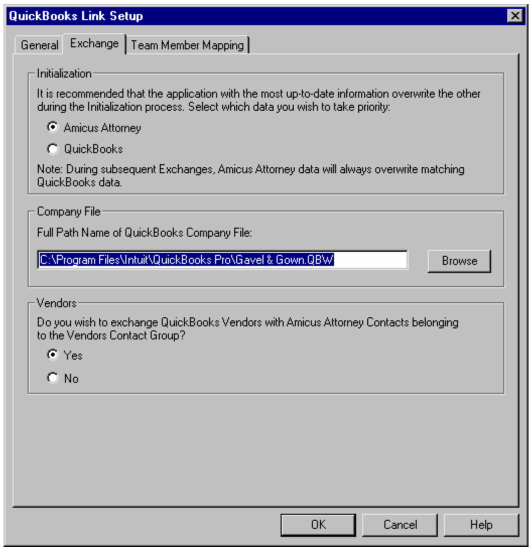
From the General tab you will need to specify the following options:

- Whether you wish to identify Customer:Jobs in QuickBooks as Client ID:Matter ID or Client Name:Matter Name. This is dependent on whether you use numbers or names for Customer:Jobs in QuickBooks. For information, see the section, Customer:Job Naming Conventions.
- Whether you use QuickBooks Classes to track Separate Office Locations, Timekeepers, Types of Law, or Fee Methods.

Note: If you wish to use QuickBooks Classes for tracking purposes, please ensure that Class Tracking has been enabled in QuickBooks.

- What Account Name you use for Fee Income.

6 Click the Exchange tab.



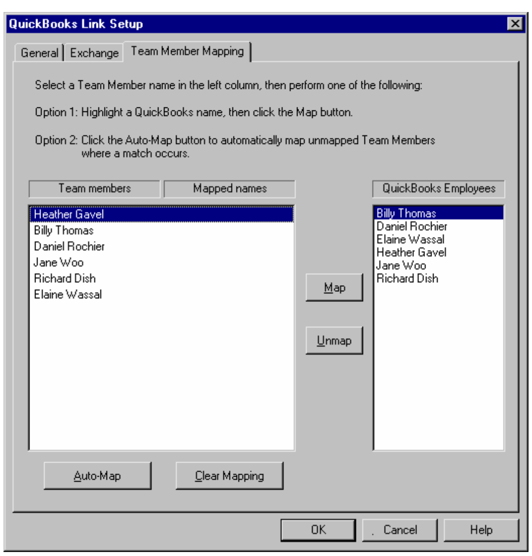
From the Exchange tab you will need to specify the following:

- Which application you wish to have overwrite the other during Initialization: Amicus Attorney or QuickBooks. It is recommended that you select the application with the most up-to-date information.

  Note: After Initialization, Amicus Attorney will always overwrite the matching data in QuickBooks.

- The full path name of the QuickBooks Company File (e.g., C:\Program Files\Intuit\QuickBooks\Amicus Attorney.qbw)
- Whether you wish to exchange QuickBooks Vendors with Amicus Attorney Contacts belonging to a Contact Group containing the word “Vendors”.

7 Click the Team Member Mapping tab. This tab will dynamically list all Team Members in Amicus Attorney and all Employees in QuickBooks.



8 The first time you access QuickBooks, you will receive the QuickBooks - Application Certificate dialog, allowing you to access the Company File by clicking “Yes, This Time” or “Yes, Always”. (For details on accessing the QuickBooks Company File, see the following section.)

9 Map your Amicus Attorney Team Members to your QuickBooks Employees from the Team Member Mapping tab.

The Team Member Mapping tab in the QuickBooks link setup dialog contains two columns: one that lists your Amicus Attorney Team Members and one listing your QuickBooks Employees. You may map your Team Members/Employees in two ways:

- By selecting a Team Member name in the left column, selecting the corresponding name in the QuickBooks Employees column, and clicking Map.
- By clicking Auto-Map to automatically map Team Members to matching Employees.

If not all Timekeepers are mapped to a corresponding Employee, and you click OK in the QuickBooks link setup dialog, the following warning will appear: “One or more Amicus Attorney Timekeepers has not been mapped to a QuickBooks Employee.”

Important: All Team Members mapped as QuickBooks Employees must also be set up as Sales Reps in QuickBooks. See the section, Assigning QuickBooks Reps to Customers.

10 Once you have finished configuring your General and Exchange options and setting your Team Member Mapping, click OK.

11 You will be reminded to perform a backup of your Amicus Attorney and QuickBooks systems before Initialization. Click OK.

QuickBooks now appears as a separate menu item in the Amicus Administrator window. There are two menu options available: Initialize and Exchange.

Before Initializing, you must first configure your settings.

Accessing the QuickBooks Company File

The QuickBooks - Application Certificate dialog will appear in the following instances:

- By default when you are configuring your Setup options for the first time (specifically, the Team Member Mapping).
- If the "Yes, This Time" option is chosen, AND you click the Team Member Mapping tab, are posting a Time Entry, or are Exchanging Information.
- If the QuickBooks Administrator has specified for the prompt to appear through the Integrated Applications area of the QuickBooks Preferences, AND you click the Team Member Mapping tab, are posting a Time Entry, or Exchanging Information.

You are presented with two options for allowing access to the QuickBooks Company File:

- You may click "Yes, This Time" to allow access to the QuickBooks Company File in the present instance and to be prompted each time the Company File is accessed through the link (i.e., when clicking the Team Member Mapping tab or posting a Time Entry).
- You may click "Yes, Always" to allow direct access to the QuickBooks Company File in every instance without the user being prompted. Note: This is the recommended setting.

If you select the "Yes, Always" option, you are asked whether you are sure you want to allow access to the QuickBooks Company File without asking the user. You are also informed in this prompt that if you choose to continue, this setting may be changed back through the Integrated Applications area of your QuickBooks Preferences.

Recommendation: The Integrated Applications area of the QuickBooks Preferences contains a setting for controlling access to QuickBooks from another application. It is recommended that the QuickBooks Administrator activate this setting to allow Amicus Attorney to access the QuickBooks Company File when QuickBooks is not running. (This is the recommended configuration for Initialization.) It may be set so that the QuickBooks - Application Certificate dialog will appear every time a Team Member tries to access the QuickBooks Company File, or it may be set so that access will be provided automatically.

The QuickBooks Administrator may also de-activate this setting to disable the link, resulting in Timekeepers being unable to post Time Entries and Exchange data through Amicus Administrator. See your QuickBooks documentation for further information on the Integrated Applications area of your QuickBooks Preferences.

Configuring Team Workstations

All Time Entries posted by Team Members are sent directly to the QuickBooks Company File. Before Team Members may post Time Entries, they need to specify the location of this file from their individual workstations.

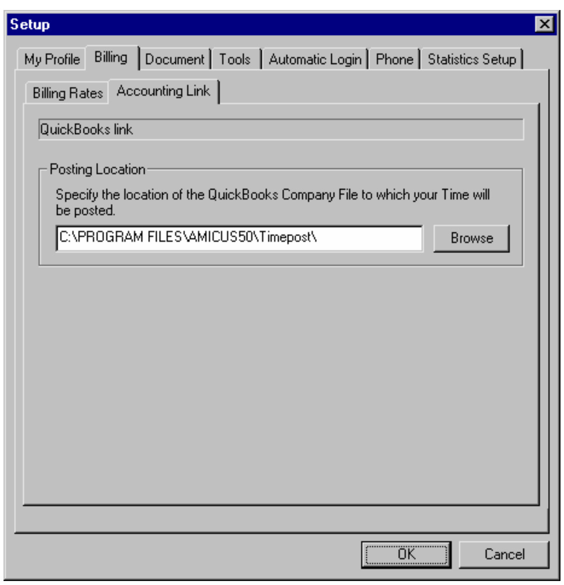
Note: The location of the QuickBooks Company File also needs to be entered at the Amicus Administrator level in the QuickBooks link setup dialog when you set your Exchange options. However, this setting is made specifically for the purposes of Initialization and Exchanging data, and not for posting Time Entries.

To enter the location of the QuickBooks Company File from a Team Member workstation:

1 From Amicus Attorney, select File > Setup.

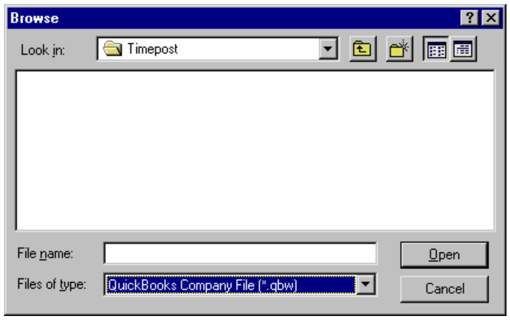
2 From the Setup dialog, click the Billing tab.

3 Click the Accounting Link tab.



4 Click the Browse button to locate the QuickBooks Company File.

5 Ensure that the same QuickBooks Company File is chosen as that which was selected during the setup in Amicus Administrator.



6 Click OK in the Setup dialog.

You are now ready to initialize the link.

Initialization

Once you have configured your settings in Amicus Administrator, you are ready to initialize the link. Initialization ensures that both programs are synchronized with each other and duplications of Files/Clients and Customers/Jobs are avoided.
The Team Administrator has the option of selecting which application data will be used in the event that records exist on both sides of the link. It is recommended that you select the program in which the data is the most up-to-date.

On Exchanges done subsequent to Initialization, Amicus Attorney data will overwrite matching data in QuickBooks.

The Initialization routine will perform the following:

- Employ all of the preferences you have indicated in the QuickBooks link setup dialog, and ensure that all Team Members/Employees have been mapped.
- Create new Matter/Client and Customer/Job records in Amicus Attorney and QuickBooks where necessary.
- Align and link existing Matter/Client and Customer/Job records where a match occurs.
- If the Team Administrator indicates by preference to Exchange QuickBooks Vendors with Amicus Attorney Contacts belonging to the Vendors Contacts Group:
    - New Vendor records will be created on both sides of the link.
    - Existing Vendor records will be aligned on both sides of the link where a match occurs.
- Align Amicus Attorney File Types with QuickBooks Job Types.
- Add Amicus Attorney Activities to QuickBooks as Service Items, if required.
- Add Amicus Attorney Billing Rates to QuickBooks as Service Items, if required, with a Service Item parent record created for each Timekeeper.
- Align Class Lists in QuickBooks according to your General Option Settings in Amicus Attorney.

Tip for first-time installs: If you are installing Amicus Attorney for the first time and have installed Amicus Administrator, but have not yet installed your Team Members, it is recommended that you add your Team Members through Amicus Administrator and Initialize the link prior to installing Amicus Attorney Team Member Offices. Running the Initialization prior to installing your Team Members will ensure that all new records are added. This will alleviate the processing of each individual transaction upon the Team Member opening their Office.

➢ **To perform Initialization:**

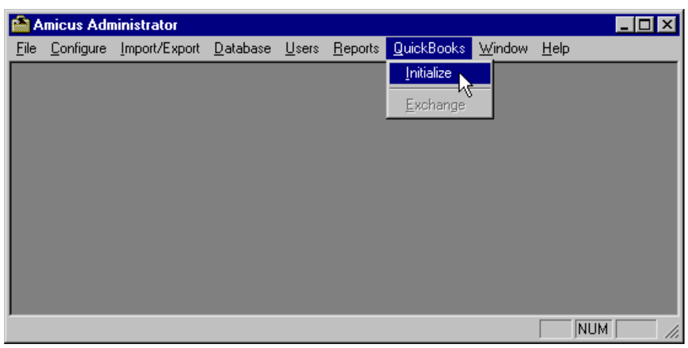
Note: Before Initializing, ensure that all Team Members are logged out of Amicus Attorney and are running online by selecting Users > User Management > Status from Amicus Administrator.

For performance reasons, it is recommended that you DO NOT have QuickBooks running during Initialization, as this will result in slower processing of the data. However, in order to run Initialization in this configuration, you must first grant access to the Company File through your QuickBooks Integrated Applications Company Preferences.

You must be running QuickBooks in Single-User mode to change your Integrated Applications Company Preferences (see your QuickBooks documentation for details).

This also applies if you wish to have QuickBooks running during Initialization. If you prefer to have QuickBooks open during Initialization, you should be running QuickBooks in Single-User mode.

1 From the Amicus Administrator QuickBooks menu, select Initialize.

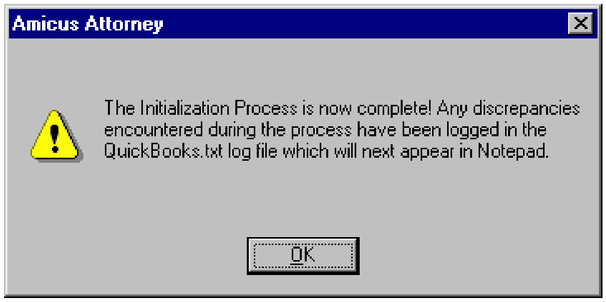


A prompt appears informing you that the Initialization process will automatically back up your Amicus Attorney data, and that it is highly recommended that you first back up your data in QuickBooks prior to proceeding with the Initialization.

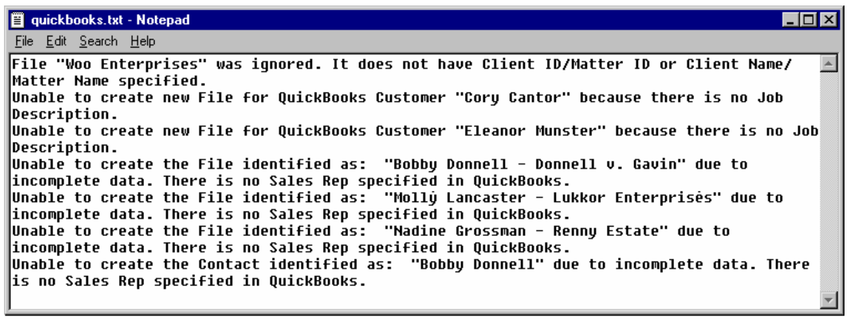
2 If you have already backed up your data in QuickBooks, click OK to proceed with the Initialization. If you have not, click Cancel, back up your data in QuickBooks, and return to Step 1 of these instructions.

The Initialization process begins.

A message appears informing you that the Initialization process is complete, and that any discrepancies that may have been encountered during Initialization have been logged in the QuickBooks.txt log file.



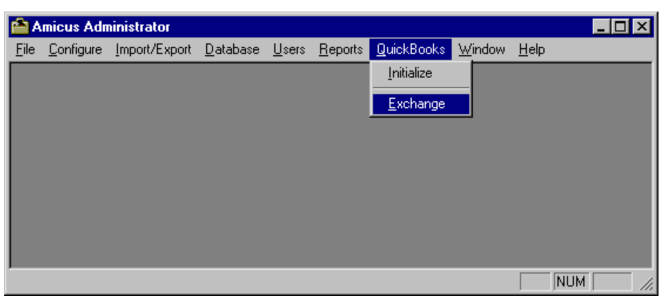
3 Click OK to access the QuickBooks.txt log file, and resolve any inconsistencies listed. For information, see the Troubleshooting section later in this document for resolving inconsistencies using the QuickBooks.txt Log file.



If you experience problems related to exchanging address information, you will need to verify your address information in QuickBooks. See the Troubleshooting section later in this document for details.

Note: If you want to reference the QuickBooks.txt file at a later time, you may access it from the following location on the server: [*drive letter*]:\Program Files\Team50\Localdb folder. Please note that the QuickBooks.txt log file will be overwritten on subsequent Exchanges.

Once the Initialization process is complete, the Exchange menu option will become active and you may begin Exchanging data.



Warning: Once you initialize the link for the first time, subsequent selections of the QuickBooks > Initialize menu option will result in a dialog warning you that you have already initialized the link and that selecting this option again will reset the link. Re-Initialization is done when Amicus Attorney and QuickBooks records become out-of-sync, or after the database has been restored.

Exchanging Data

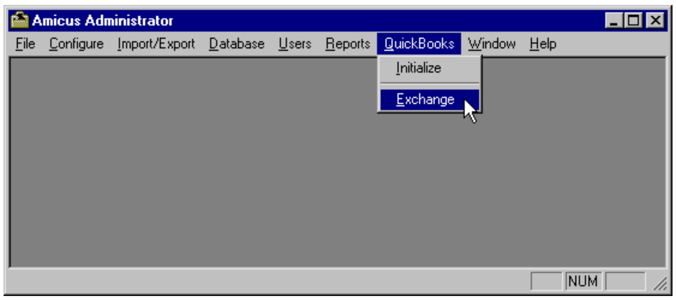
The QuickBooks Exchange menu option is enabled after you have Initialized the link. The Team Administrator performs the process of Exchanging data between Amicus Attorney and QuickBooks on a regular basis, ensuring that information is kept up-to-date on both sides of the link.

Records that are locked as a result of a Team Member accessing a record will not be included in the Exchange.

Note: It is not necessary for Team Members to be logged out of Amicus during an Exchange—if any relevant Files or People are locked (in use), those particular records will be skipped at this time and dealt with on a subsequent Exchange. For recommendations on user access to QuickBooks during an Exchange, please consult your QuickBooks documentation.

➢ **To exchange data between Amicus Attorney and QuickBooks:**

1 From Amicus Administrator, select QuickBooks > Exchange.



2 If the QuickBooks - Application Certificate dialog appears, allow access to the file by clicking “Yes, This Time” or “Yes, Always”. (For details, see the section, Accessing the QuickBooks Company File, earlier in this document.)

The Exchange of data begins.

If you experience problems related to exchanging address information, you will need to verify your address information in QuickBooks. See the Troubleshooting section later in this document for details.

You may receive a message informing you that discrepancies or locked records were encountered during the Exchange, and that you will need to refer to the QuickBooks.txt log file to resolve them.

3 Click OK to access the QuickBooks.txt log file and resolve any inconsistencies listed. For information, see the Troubleshooting section later in this document for resolving inconsistencies using the QuickBooks.txt Log file.

If you want to reference the QuickBooks.txt file at a later time, you may close it and access it from the [*drive letter*]:\Program Files\Team50\Localdb folder on the server. Please note that the QuickBooks.txt log file is overwritten each time you Exchange information.

The latest changes are now reflected in both databases.

Posting Time Entries

Team Members may post Time Entries to QuickBooks from their Amicus Attorney Office through the Time Sheets module, provided:

- The Team Administrator has set up the link.
- They have QuickBooks Pro or Premier Edition installed on their workstations.
- They have specified the location of the QuickBooks Company File in their Team Member Settings.
- The QuickBooks Administrator has provided access to the QuickBooks Company File in the Integrated Applications area of the QuickBooks Preferences.

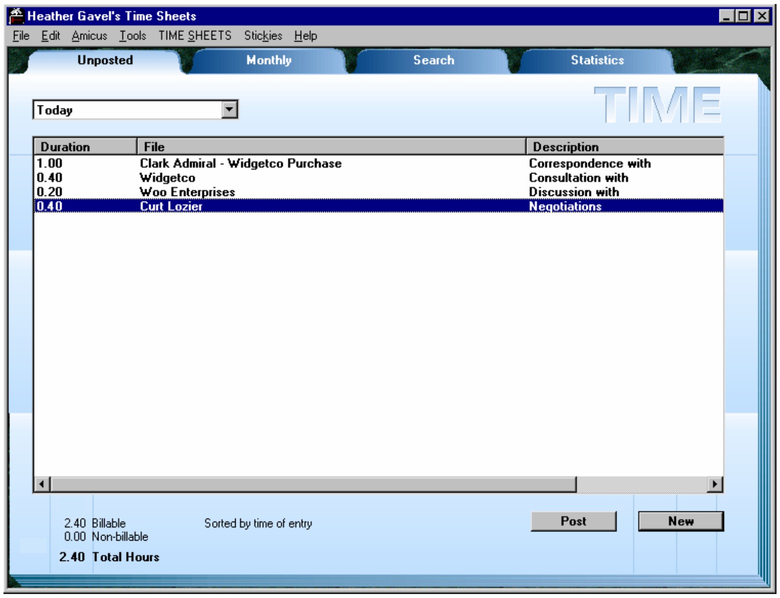
Direct posting from the Team Member workstation, as it is commonly referred, has some restrictions:

- Posting will fail if a user attempts to post on a File that has been created in Amicus Attorney but not yet created in QuickBooks because the Team Administrator has not yet done an Exchange. The user may post at some later time, when the File has been created in QuickBooks after an Exchange from Amicus Administrator.
- Users cannot post when offline.

Non-Timekeepers cannot post Time Entries from their own Office. However, any Team Member with the correct password may open a Timekeeper’s Office in Amicus Attorney and create or post a Time Entry for that Timekeeper.

➢ **To post Time Entries from Amicus Attorney to QuickBooks:**

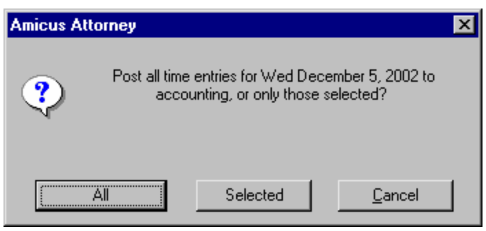
1 Open the Amicus Attorney Time Sheets module.



2 If you only wish to post selected Time Entries, highlight only those Time Entries prior to clicking Post, otherwise, click Post.

3 If the QuickBooks - Application Certificate dialog appears, allow access to the file by clicking “Yes, This Time” or “Yes, Always”. (For details, see the section, Accessing the QuickBooks Company File.)

4 You will be prompted whether you wish to post specific Time Entries or all Time Entries at once.



- If you wish to post all your Time Entries for that day, click All.
- If you wish to post only the Time Entries you have selected, click Selected.

If the posting of Time Entries is successful, a prompt appears asking you if you would like to obtain a printout of the Time Entries you have posted.

If the posting is unsuccessful, a message will appear indicating that not all your Time Entries were posted. Any unposted Time Entries will remain in your Time Sheets module.

If system problems occur during a post routine, you may receive a message the next time you start Amicus Attorney.

Troubleshooting

The following topics present information that will help you resolve any difficulties that you may encounter when using the QuickBooks link.

Re-Initialization

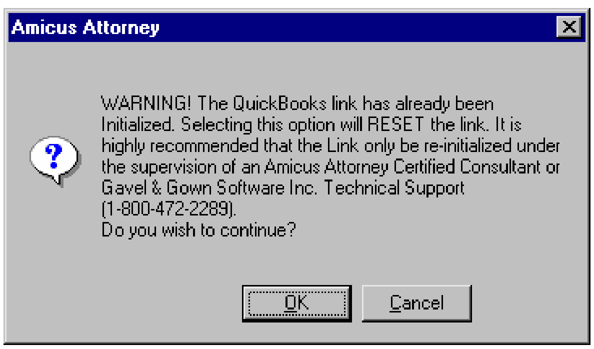
A Re-Initialization utility is available in Amicus Administrator. This utility should only be used in the event that records become out of synch, perhaps due to some major change that has occurred in either database. This may occur after restoring a backup, recovering the database, or performing an archive or de-archive of records in Amicus Attorney. The Re-Initialization utility will first strip out all QuickBooks List identifiers stored in Amicus Attorney records, and then run the Initialization routines. Note that this process may be lengthy depending on the size of the databases and the number of Team Members.

Important Note: It is highly recommended that you DO NOT re-initialize the link without the assistance of an Amicus Attorney Certified Consultant or a Gavel & Gown Technical Support Representative.

To re-initialize the link:

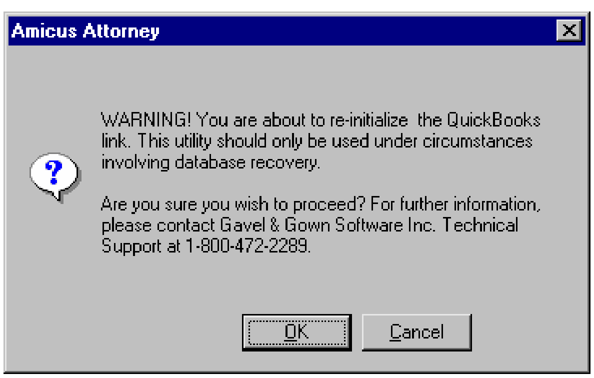
1 From Amicus Administrator, select QuickBooks > Initialize.

The following dialog appears:



2 Click Continue.

3 A second dialog appears that reads:

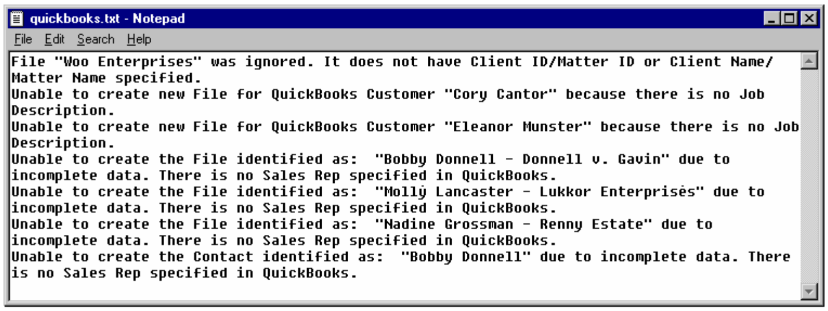


4 Click Continue to proceed.

Note: After re-initializing the link, you may need to resolve inconsistencies using the QuickBooks.txt log file. See the following section, Resolving Inconsistencies using the QuickBooks.txt Log File.

Resolving Inconsistencies using the QuickBooks.txt Log File

After you have performed an Initialization of the link or an Exchange of data, you may receive a message stating that discrepancies encountered during the Initialization/Exchange process have been logged in the QuickBooks.txt log file. When you click OK to this message, the QuickBooks.txt log file appears.



File "Woo Enterprises" was ignored. It does not have Client ID/Matter ID or Client Name/
Matter Name specified.
Unable to create new File for QuickBooks Customer "Cory Cantor" because there is no Job
Description.
Unable to create new File for QuickBooks Customer "Eleanor Munster" because there is no Job
Description.
Unable to create the File identified as: "Bobby Donnell - Donnell v. Gavin" due to
incomplete data. There is no Sales Rep specified in QuickBooks.
Unable to create the File identified as: "Molly Lancaster - Lukkor Enterprises" due to
incomplete data. There is no Sales Rep specified in QuickBooks.
Unable to create the File identified as: "Nadine Grossman - Renny Estate" due to
incomplete data. There is no Sales Rep specified in QuickBooks.
Unable to create the Contact identified as: "Bobby Donnell" due to incomplete data. There
is no Sales Rep specified in QuickBooks.

The QuickBooks.txt log file is saved by default to the following folder on the server:

[*drive letter*]:\Program Files\Team50\Localdb

Note: Each time you Exchange information, the QuickBooks.txt log file is overwritten.

➢ **To resolve any inconsistencies that occurred during the Initialization of the link or Exchange of data:**

1 With the QuickBooks.txt log file open in Notepad, select File > Print.

In the QuickBooks.txt log file you will find a list of records containing various discrepancies that need to be addressed on both sides of the link. For example, an Amicus Attorney File may contain incomplete data and cannot be created as a Job in QuickBooks, or an Amicus Attorney File cannot be created from a QuickBooks Customer because no Job information for that Customer exists.

Please also note that some information may refer to items that were altered upon Initializing/Exchanging information. For example, if the name of an Amicus Attorney Activity exceeds the maximum number of allowable characters (31) for the name of a Service Item in QuickBooks, the Service Item name will be truncated in QuickBooks.

2 Take the necessary steps to resolve the record inconsistencies listed so that all data is aligned. This will require you to manually modify the discrepant information in Amicus Attorney and/or QuickBooks.

Once you have resolved the inconsistencies, you may Exchange information to ensure that all data is properly aligned and up-to-date.

Verifying Address Information

QuickBooks automatically assigns First, Middle, Last, and Company Names to the Street Address fields (line 1 and line 2, respectively) for purposes of creating a full Bill To Customer Address. To ensure consistency, the link will also automatically assign Name fields to the Street Address. It is important to note that changes or new address information brought over from QuickBooks to Amicus Attorney will result in an assignment of all data in the Street Address field, including names.

The following example shows the Bill To Address format for a Customer who has both Company and First/Last Name information:

- First Name, Middle Initial, and Last Name (if applicable)
- Company Name (if applicable)
- Street Address
- City, State/Province, Zip/Postal Code
- Country

If you are experiencing problems when exchanging address information, open the Edit Address Information dialog in the QuickBooks Customer:Job record, and ensure that the address information items (i.e., Address, City, State/Province, Zip/Postal Code, Country) reside in their proper fields.

Tip: If a new Client/Contact or Vendor/Contact is created in Amicus Attorney, or if you update the Amicus Attorney Contact card from your Amicus Attorney QuickBooks Client Information field, you may want to edit the Street Address in the Primary Contact card to remove any names, as they may affect Document Assembly output. For information on updating your Client Information, please see the section, About the QuickBooks Client Information dialog. For information on changing Contact card information, consult the section, Changing Contact Details, in your Amicus Attorney Team Member online Help.

Error messages

Cannot add to QuickBooks due to same name used in another list

When Exchanging information, you may receive an error message stating that the name is already being used in another QuickBooks list. Such an error message will resemble the following:

"File [*File name*] has been ignored. It is assigned to Customer [*Customer name*], which cannot be added to QuickBooks because the same name is already used in the QuickBooks Entity Lists."

The following scenarios will cause such an error message to appear upon Exchanging information:

- If an Amicus Attorney Contact assigned as a Client on a File is also a Timekeeper.
- If an Amicus Attorney Contact assigned as a Client on a File also belongs to the Vendors Group.

- If a Timekeeper is also an Amicus Attorney Contact belonging to the Vendors Group.

Although Amicus Attorney allows for the above scenarios, QuickBooks does not permit you to share names between the Employee, Customer, and Vendor Lists. For example, if you have entered a name in the QuickBooks Employee List, you cannot enter a duplicate name in the Customer List or Vendor List. It is recommended that the name be changed in some manner to differentiate it from the other (e.g., John R. Doe instead of John Doe).

One or more Time Entries not posted to QuickBooks

If you attempt to post a Time Entry from Amicus Attorney, and someone is currently editing a Time Entry for the same Customer:Job in QuickBooks, the following error message appears:

"One or more Time Entries were not posted into QuickBooks. There is an error when saving a Time Tracking. QuickBooks error message: Records need to be locked before they can be modified."

Foreign characters not supported

Please note that the Exchange of foreign characters (e.g., à, é, ñ, ö, ú, ý, ß) in text fields is not supported in the link.

For further information, contact

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