

## How Do I Know If I Need an Amicus Certified Consultant?

Over the past seven years working as an Amicus Certified Consultant, I have worked with numerous clients who have learned the hard way that it would have been worth the time and money to have an Amicus CC help them install, configure, and customize Amicus, and train their staff properly from the start. I have listed some of the procedures and problems that I have helped clients resolve.

**Existing Amicus Users** – Please read this carefully, and if your Amicus system seems to have any of these symptoms, please contact your local Amicus CC. Any good Amicus CC will be able to spend up to an hour examining your system (either on-site or using remote software) to verify whether it has been installed properly. Then if there are any issues or problems, they should be able to give you some recommendations and a quote to correct any issues or problems. Training for your staff may also be recommended at that time. If you haven't worked with an Amicus CC yet, or do not have one near you, then please call me and I would be happy to talk to you about your situation.


**New Amicus Users** – If you have just purchased Amicus and haven't implemented it yet, now is the time to contact an Amicus CC. If you doubt the value of using outside help – be sure to check with other firms in your area – they may have already learned the hard way, or may be able to give you valuable referrals.

My hope is that all Amicus users will be able to benefit from my experience by avoiding potential problems or resolving existing problems, allowing your firm to become more productive.

### Administrator Procedures

1. Adding a New User - you are adding a new user in the firm, and want to be sure that the new user can see all current and future Files and/or Contacts.
2. Transferring an Amicus license – you have a new user who will be taking over for an existing Amicus Team Member. There are a series of steps that need to be followed prior to, and after the transfer of a license, such as posting time entries, and modifying Preferences in all Amicus offices.
3. Synchronization with Palm, Outlook or any accounting system – Bring in an expert who has worked with these links to assure that your programs are linked properly,
4. You want to begin creating templates in Word or WordPerfect, and need some help in the planning process, and also setting up File and Contact custom fields, and inserting fields into templates.
5. Users are complaining that Amicus is slow, and you notice that the size of your database seems to be very large. Should you consider archiving files, or is there something else that you can do to speed things up?
6. Corrupt Database Error Message – If your server ever crashes while the Amicus Administrator is open, the next time you open the Administrator, you will see a message that says “Your database appears to be corrupt. Do you want Amicus to attempt to fix the problem?” It is recommended that you “Just Say No”, and then rebuild the Amicus index, regenerate the Administrator and all offices. We can help you with the process, and give you suggestions to keep this from recurring.
7. Security (Client/Server Edition only) – You have noticed that allowing all Team Members to create or delete files and/or contacts is causing problems. Or you have an employee who is leaving, and you are worried that they may cause problems in Amicus prior to leaving. You can set up various Access Profiles for all of your Amicus users to disable or hide certain features to avoid potential problems.

## Amicus Users – Error Messages, Avoiding Potential Problems and Becoming More Productive

1. Error messages while using Amicus
  - a. \*A message appears saying that you are no longer attached to the Amicus server, and you are asked if you wish to continue working off-line.
  - b. \*You see any type of error message while attempting to synchronize Amicus with any of the following: Palm Pilot, Outlook, Amicus secondary office, or any accounting program, such as PCLaw, Timeslips, QuickBooks or TABS III.
  - c. \*You see the following error message “AA50 – This program has performed an illegal operation and will be shut down.” Or your computer crashes while Amicus is open. When you start up Amicus again, you see the message “You have not shut down properly – please be sure to exit out of Amicus every time before shutting down Windows.”
  - d. \*You see the ‘Locked’ icon (  ) on a File or Contact.
2. Duplicates in Contacts or Files Module
  - a. \*You notice a duplicate (or perhaps triplicate or quadruplicate) contact while viewing the Contact index, or selecting a Contact to assign to an event, phone call, phone message, etc.
  - b. \*You notice duplicate contacts attached to a File, each with similar information.
  - c. \*You notice what looks like a duplicate file – one may have a ‘1’ at the end of the Client ID or Short Filename, and upon further investigation, both files appear to be the same.
3. Amicus Office Setup & Preferences (Defaults)
  - a. \*When creating a new contact, you are not prompted to do a duplicate check (Search the entire Amicus Team to see if the contact exists).
  - b. Every time you create an event, a contact, or a file, you have to select the same Team Members, or modify specific fields (on a consistent basis).
  - c. You seem to be having problems with the synchronization between Amicus and your Palm Pilot, and would like a way to quickly find events, ToDo’s or contacts that you entered into the Palm so that you can assign other Team Members to them.
  - d. Files seem to disappear from the Active status list – the Active checkbox is gone, and File are only visible when ‘All’ is selected from the Files Index,
4. Problems with Document Generation (Templates)
  - a. You try to open (View) a document from an Amicus File brad, and you receive an error message saying that the path cannot be found.
  - b. You do not have the appropriate Amicus toolbar in MS Word or WordPerfect that will allow you to perform the Amicus merge, or select fields to be placed into a template.
  - c. You try to generate a Word document from a File or Contact, and you receive an error message that the macros in this project are disabled.

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**\*Resolving these issues properly could eliminate costly future fixes**