Amicus Link Guide: PCLaw

Applies to: Amicus Attorney

Synchronize your Amicus and PCLaw matters and clients, and dynamically exchange your Amicus time entries and expenses to PCLaw.

About the Link

Amicus Attorney users can increase the efficiency of their firm by exchanging their data with PCLaw™. There is no need to enter data twice. The Amicus Attorney-PCLaw Link provides seamless bi-directional integration, saving time while ensuring consistency.

You can exchange Amicus File and Contact information with PCLaw Matter and Client information, and can map Amicus Lawyers and File Types to PCLaw Lawyers and Types of Law. A Link wizard guides you through configuration of the exchange options. The link ensures that Amicus Activities and Billing Rates are available in PCLaw and that posted Time and Expenses go directly to PCLaw without the need for a separate exchange process.

You have the choice of exchanging Amicus Files individually or performing a global exchange of all Files and Contacts.

The first part of this *Guide* is primarily written for Amicus Administrators, describing how to set up and maintain the Link. For information on daily use of the Link functions, see "Using the Link" on page 33.

IF UPGRADING FROM AN EARLIER VERSION OF AMICUS ATTORNEY: There are some fundamental differences between the Version 7 and 2008 or higher Amicus Attorney accounting link initialization processes and those applied in earlier versions of Amicus Attorney. Reclassifying your data prior to database conversion may save you some steps. For details, see "Special preparation prior to database conversion from an earlier version of Amicus Attorney" on page 6.

What you need

The Amicus Attorney-PCLaw Link requires:

- Installed on the Amicus Attorney Application Server:
    - Amicus Attorney Server
    - PCLaw
- Installed on the workstations of users who wish to use the Link:
    - Amicus Attorney Workstation

For a list of supported PCLaw versions, see the *Amicus Attorney Software & Hardware Requirements*, available from the Technical Resource Guides/Updates section of our website.

IMPORTANT: To configure and activate the Link with PCLaw, you must contact a PCLaw Support representative for PCLaw configuration instructions and a product key (`plaalink.key`). Place this product key file in the appropriate Data folder.

IMPORTANT: For the PCLaw Link to work without interruption in normal day-to-day use, we strongly recommend that Amicus Server be run under Windows Server 2012 / 2012 R2 with Remote Desktop Services enabled.

What information is exchanged

Records are exchanged between Amicus Attorney and PCLaw in the directions indicated, using appropriate match criteria.

Amicus record type	Exchange direction	PCLaw record type
Files	◄——————►	Matters
Client Contacts	◄——————►	Clients
Time Entries	——————►	Time Sheet
Time Entries (Flat Rate)	——————►	Fee Sheets
Expenses	——————►	Expense Recovery

In addition, Rates are synchronized between Amicus Attorney and PCLaw.

Amicus Rates	Exchange description	PCLaw Rates
Timekeeper Billing Rates	one-time exchange during initialization only, in the direction you specify	Lawyer Rates
Activity Code Rates	one-time exchange during initialization only, in the direction you specify	Task Code Rates
Task-Based Billing Task Code Rates	one-time exchange during initialization only, in the direction you specify	Task Code Rates

Scope

In some instances, the items noted above are filtered based on criteria such as their current status (e.g. Active versus Inactive). The following rules apply.

Files/Matters

- **Amicus Files** are NOT included in exchanges if they:
  - are Closed, or
  - have the Exclude From Link checkbox selected, or
  - have a Responsible Lawyer that has not been mapped to a PCLaw Lawyer.
- **PCLaw Matters** are NOT included in exchanges if they:
  - are Inactive or Archived, or
  - have the Disable Updates With Other Software option selected, or
  - have a Type of Law or Lawyer that has not been mapped to an Amicus File Type or Responsible Lawyer.

Contacts/Clients

- Amicus Contacts are included in exchanges only if they are the Primary Client on a File that is eligible for exchange
- PCLaw Clients are included in exchanges only if they are on a Matter that is eligible for exchange

Mappings

The following *common list items* must be mapped through the PCLaw Link Configuration wizard in Amicus Attorney, by the Amicus Administrator. For example, in order to successfully exchange an Amicus File of a particular File Type with a PCLaw Matter of a particular Type of Law, the File Type and Type of Law must first have been mapped. Mapping adjusts for any naming differences in the two applications.

It is important to map any new common list items whenever they are added in either application. For more information, see "Maintaining the Link" on page28.

Amicus items	PCLaw items
Timekeepers who are Responsible Lawyers	Lawyers who are Responsible Lawyers
Timekeepers	Lawyers
Billing Rates	Rate Categories
File Types	Types of Law
Activity Codes	Task Codes
Task-Based Billing Code Sets	Types of Law
Task-Based Billing Task Codes	Task Codes
Task-Based Billing Activity Codes	Explanation Codes
Expense Codes	Explanation Codes

Amicus Firm Members are designated as Timekeepers in the Administration Profile of their Contact record.

Lawyers, Responsible Lawyers, and Timekeepers

To ensure the proper assignment of Responsible Lawyers in Amicus Attorney, each Amicus Timekeeper who is a Responsible Lawyer must be mapped to a PCLaw Lawyer. This is a one-to-one relationship.

To ensure the proper posting of Time Entries and Expenses from Amicus Attorney to PCLaw, each Amicus Timekeeper (even the ones who are not Responsible Lawyers) must be mapped to a PCLaw Lawyer. If necessary, you can map the same PCLaw Lawyer to more than one Amicus Timekeeper.

Link setup checklist

The Link is configured by the Amicus Administrator from the Amicus Attorney Office module. When you set up the Link, you will need to complete several steps, listed below and described in more detail throughout this *Link Guide*. It is assumed that you have installed and configured Amicus Attorney and have ensured that it is running properly.

1   Read this *Link Guide* to gain an understanding of how information in the two applications will be exchanged and matched.

2   Install PCLaw on the Amicus Attorney Application Server. Test PCLaw to ensure that it is running well. The PCLaw portion of the Link is automatically installed when you install PCLaw.

3   Ensure that date formats are set the same way in the Regional Options tab of the Windows Customize Regional Options dialog at the Amicus Attorney Server and at Workstations of Link users, and also in the PCLaw system settings.

4   Prepare your information in both applications, where necessary, as detailed in "Preparing your data" on page 6.

5   Run the PCLaw Link Configuration wizard in Amicus Attorney to set your options and mappings.

6   Perform the initialization.

7   **Optional (RECOMMENDED): RESTARTING THE SERVER:** Whenever the Amicus Attorney Application Server is restarted, someone must log in to Windows at the Server before Amicus Attorney may communicate with PCLaw. If desired, however, you may configure your system to eliminate that necessity. For details, see "Configuring your system to handle Server restarts" on page 30.

Amicus Attorney and PCLaw will now be ready to allow users to perform exchanges, post Time Entries and Expenses to PCLaw, add and delete Files/Matters and Contacts/Clients, and so on.

Administrators will need to maintain the common list mappings on an on-going basis as items are added or deleted in either application.

Preparing your data

We recommend that the firm's PCLaw/Amicus expert, with the assistance of the Amicus Administrator and PCLaw Administrator, prepares the firm's data for Link configuration and initialization.

Special preparation prior to database conversion from an earlier version of Amicus Attorney

The Amicus Attorney link with PCLaw includes new processes that require that data eligible for exchange with PCLaw be "clean" prior to initialization. There are huge advantages to this approach. It allows for a prompt-free initialization, it avoids duplicates, and more importantly, it ensures that the link runs as smoothly as possible thereafter.

Completing some preliminary reclassification and data checks PRIOR TO CONVERTING DATA FROM AN EARLIER VERSION OF AMICUS ATTORNEY will facilitate a smooth Initialization process.

If upgrading from Amicus Small Firm, we recommend that you run the Accounting Integration Consistency Checker in Small Firm. This utility enables you to test your Amicus Attorney database for data inconsistencies, and directly open any problem Files for viewing and/or editing. For details, see the *Accounting Integration Consistency Checker* document, available from the Technical Resource Guides/Updates section of our website

- Each File must have one Primary Client. This eliminates any ambiguity as to which Client Contact on a File is the candidate for exchange with PCLaw. Database Conversion will auto-set the Primary Client flag where there is only one Client on a File. Files that have more than one Contact with a Role of "Client" the flag will have this flag automatically set only if one of the Clients on the File matches the Full Client Name.

  Below are two tips to facilitate the setting of this flag during conversion:

  - Prior to Database Conversion, reclassify the Role of all but the Primary Client on a File. To do this, assign those Clients on the File that are not to be exchanged with PCLaw an alternative Role On File, such as "Other Client" or "Contact at Client". Be sure to leave one Contact designated as the "Client". (An Amicus Administrator may need to add these alternative People Roles from Firm Settings if they don't already exist in your Role On File list.)

  - Alternatively, confirm that the name of one of the Clients matches exactly with the Full Client Name field on the Amicus File.

- Files that are not to be exchanged should be marked Excluded. We recommend that you also exclude the corresponding PCLaw Matter by selecting the "Disable Updates with Other Software" option.

- Each Primary Client must have a unique Client ID. If two or more Clients have the same Client ID, there is a risk that Files and Clients may become cross-linked, resulting in data corruption.

- Ensure that Files to be exchanged have the correct Client and Matter IDs.

General preparation

Regardless of whether or not you have upgraded from an earlier version of Amicus Attorney, we recommend that you prepare your Amicus and PCLaw databases as follows.

Common lists

It is not necessary that corresponding common list item names match exactly in each application, as the Link Configuration wizard will permit items to be mapped. For example, Litigation - Civil ↔ Civil Litigation.

In addition, the Common Lists Alignment dialogs of the wizard permit you to directly add some list items from one program to the other.

Amicus common lists	PCLaw common lists	Add to Amicus via the wizard	Add to PCLaw via the wizard
Timekeepers who are Responsible Lawyers	Lawyers who are Responsible Lawyers	No	No
Timekeepers	Lawyers	No	No
Billing Rates	Rate Categories	YES	YES
File Types	Types of Law	YES	YES
Activity Codes	Task Codes	YES	YES
Task-Based Billing Code Sets	Types of Law	YES	No
Task-Based Billing Task Codes	Task Codes	YES	YES
Task-Based Billing Activity Codes	Explanation Codes	YES	YES
Expense Codes	Explanation Codes	Yes, two-way	

PCLaw data

- Optionally, perform a database integrity check in PCLaw. To do this, ensure that no other users are in PCLaw, select Tools > Verify Data Integrity, and select the checkboxes for the data to be verified: Static Data (Lawyers, Task Codes, Explanation Codes, etc.), Matter/Client/Vendor/Address, and Time/Fee Entries.

Amicus data

- Confirm that every Amicus File eligible for exchange has a Primary Client, a Responsible Lawyer, and a Client ID/Matter ID.

- Ensure that the Amicus File Preference that specifies the Firm Members to be automatically assigned to new Files is set properly for each Responsible Lawyer.

- Although the Link Configuration wizard provides convenient adding and mapping functions, you might find it useful to first delete unused items, and rename or edit some common list items.

TIP: If the Pre-Initialization Check fails on any Files that the initializing Amicus Administrator is Restricted from viewing or editing, the error log will simply report "restricted" rather than the specific Short File Name. We therefore recommend that all Files be made accessible to that Amicus Administrator for the period of initialization. On each File, either remove Restrictions or assign the Amicus Administrator and ensure they have Edit rights.

If your data is either all in PCLaw or all in Amicus, then complete the following step:

- Because an exchange will transfer only Open Files/Matters that are not flagged as Excluded, and only if the Lawyer in PCLaw is mapped to a Timekeeper who is a Responsible Lawyer in Amicus, ensure that these are set properly.

If your data is in both Amicus and PCLaw, then complete the above steps and also the following additional steps:

- For initialization purposes, decide which application has the most accurate data and should therefore take priority in the exchange of Files/Matters and Contacts/Clients.
- For the exchange of various Rates, decide which side has the most accurate data and should therefore priority.
- Check that Client IDs and Matter IDs match on both sides.
- Print out any Archived Matters in PCLaw, and then either Close or Exclude any corresponding Files in Amicus, to help avoid the creation of duplicate records.

It will be necessary to exclude some Files from exchange. For instructions on how to exclude Amicus Files, see "Excluding an Amicus File from the Link" on page 35. For instructions on how to exclude PCLaw Matters, see your PCLaw documentation.

IMPORTANT: We recommend that you exclude Amicus Non-Billable Files (including Vacation and Personal Files) from the exchange. Any Time Entries exchanged would not be marked Non-Billable in PCLaw.

You are now ready to proceed to configuring the Link.

Configuring the Link

The Link Configuration Wizard helps you step through basic options, link and exchange preferences, common list alignment (where you can add file types, activity and expense codes, etc. to Amicus or PCLaw, if necessary), and field mapping. A Pre-Initialization Check is run automatically before initialization.

The Wizard is available to Amicus Administrators from the Firm Settings dialog, accessible from the Office module. Follow the steps below:

1   **IMPORTANT: Perform the configuration at your Amicus Attorney Application Server.** This will enable you to see the PCLaw login dialog. Be sure to select the Store Password option so that exchanges can be performed from other PCs afterward. Note that a Remote Desktop connection is not suitable for the configuration process.

2   Choose Firm Settings on the navigation list in the control panel of the Office module. The Firm Settings view appears. Then choose Time > Accounting in the view. The Accounting System view of the details dialog appears.

3   Select "PCLaw" in the accounting system list box.

4   Click Configure to run the Link Configuration wizard. Complete each of the multi-dialog steps in order, as described in the following sections.

Welcome dialog of the wizard

The Welcome dialog of the wizard displays the current completion status of each step in the configuration.
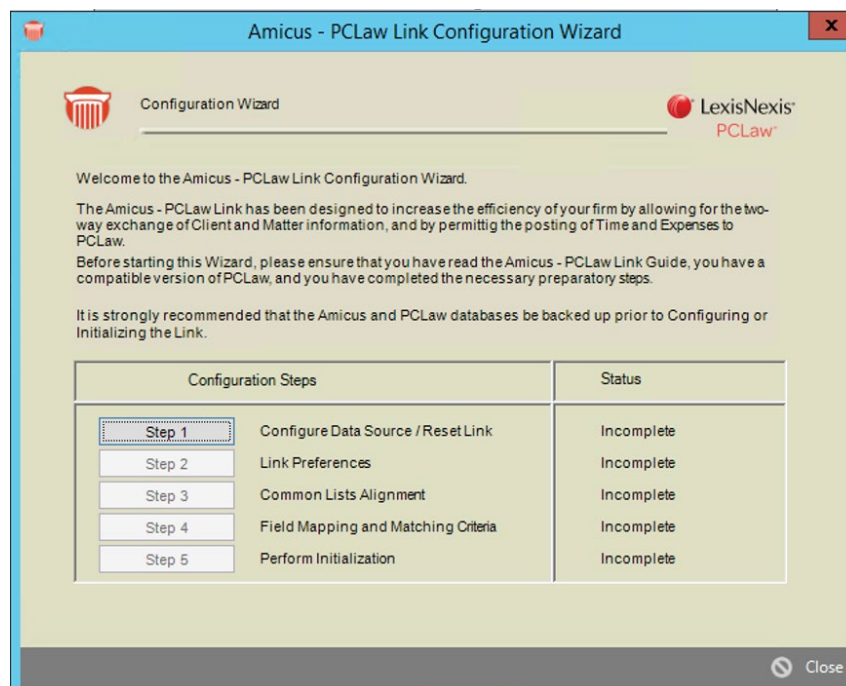
You can click Print Settings to print your settings.

Complete the configuration steps as described in the following sections. The completion status of each step is shown at the right.

Step 1 - Set the data source for the Link

Click Step 1 in the Welcome dialog of the Link Configuration wizard. The Data Source dialog appears.

1 Enable PCLaw for exchanges:

   a At the Server, start PCLaw and log in to the Set of Books.

   b Choose Options >Connection Settings and enable the "Use this Set of Books when connecting with other programs" option. Also enter a PCLaw username and password.

   c Ensure that the product key file (plaalink.key) obtained from PCLaw Technical Support has been placed in the appropriate Data folder.

2 Click Test Connection to ensure that the connection works.

3 Click Finish. The Welcome dialog appears.

Step 2 - Set the Link preferences
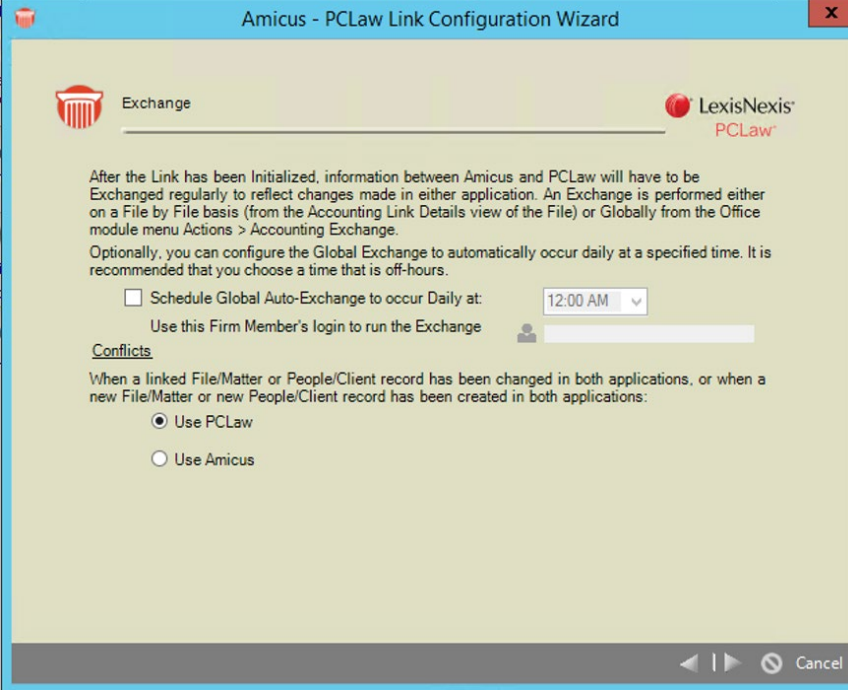
Click Step 2 in the Welcome dialog of the Link Configuration wizard. In this step, you set general initialization and exchange preferences for the Link.

Step 2a - Initialization options
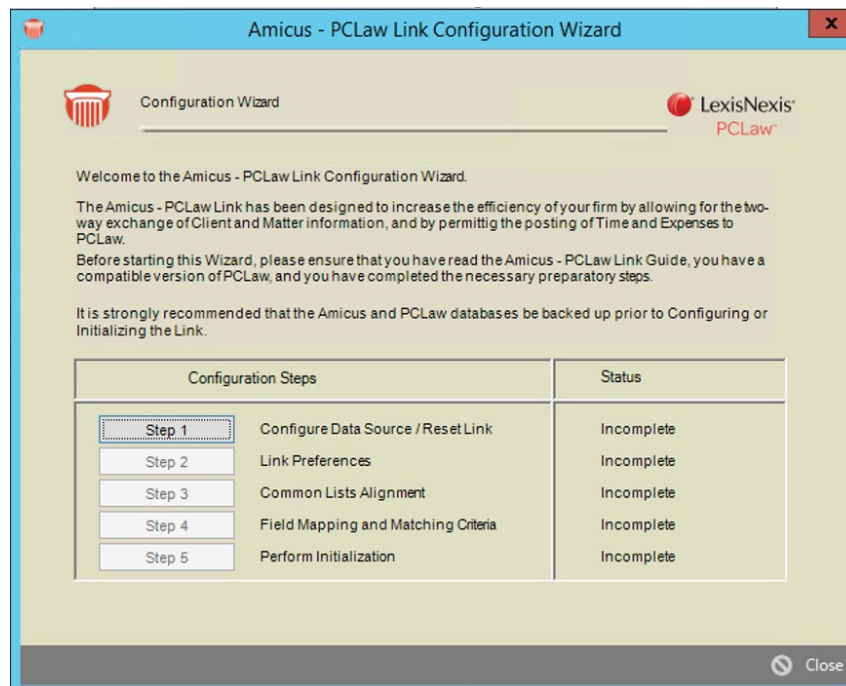
Specify whether Amicus or PCLaw takes priority during initialization.

Step 2b - Exchange

Specify whether and when a Global Exchange should occur daily automatically. A Global Exchange includes all Files and Contacts added or modified since the last exchange in either Amicus or the accounting application. We recommend that you choose a time that is off-hours, and does not conflict with other scheduled services, such as automatic backups your firm may have scheduled, or the Amicus Daily Checks routines which run at midnight.

Select a Firm Member who has been granted Amicus security access to Firm Files and Contacts. Because this user's login session will be in use whenever a Global Exchange occurs, it is important to schedule a time when they will not require access to Amicus.

Specify whether Amicus or PCLaw takes priority in exchanges. Then click Next.

Step 2c – Additional Options

In the Expenses section, specify whether users can post Expenses from Amicus to PCLaw. For more information about Expenses, see "Working with Expenses on a File" on page 40. Then click Finish. The Welcome dialog reappears.

In the Match Criteria section, select the option if you want a secondary check on names done during initialization. Then, for a File/Matter that matches on Client and Matter IDs, the Primary Client's Name in Amicus Attorney is compared to the Client's Name in PCLaw. If the names do not match exactly, the File/Matter will not be exchanged and a warning will appear. If you do NOT select this option, minor differences in the names (e.g. "Chris" vs. "Christopher", or punctuation) will not cause the match to fail, and will result in the names from one application overwriting those in the other application during initialization (according to your Priority preference in Step 2a), even if the names are quite different.

Step 3 - Map the common lists

Click Step 3 in the Welcome dialog of the Link Configuration wizard. In this step, you map and add (where supported) shared list items to ensure that they are available in both Amicus and PCLaw.

NOTE: The following mapping dialogs include an Auto button that enables you to quickly and automatically map matching items.

Step 3a - Map the Timekeepers who are Responsible Lawyers

After an informational dialog, the Align Responsible Lawyers dialog appears.

Map the PCLaw Lawyers to Amicus Timekeepers, for Responsible Lawyer assignment. Each Amicus Timekeeper who is a Responsible Lawyer must be mapped to a PCLaw Lawyer. You can have more Lawyers in PCLaw than Timekeepers in Amicus, or vice versa. A PCLaw Lawyer can be mapped to only one Amicus Timekeeper, and vice versa. Then click Next.

Step 3b - Map PCLaw Lawyers with Amicus Timekeepers

Map the PCLaw Lawyers to Amicus Timekeepers, for Time Entry and Expense posting. All Amicus Timekeepers must be mapped, even the ones who are not Responsible Lawyers. A PCLaw Lawyer can be mapped to more than one Amicus Timekeeper, and vice versa. Then click Next.

Step 3c - Map PCLaw Rate Categories with Amicus Billing Rates

Map the PCLaw Rate Categories to Amicus Billing Rates. Add new PCLaw Rates (with Nicknames) or Amicus Billing Rates if necessary. Then click Next. A second page appears.

Rate Value priority—Specify whether Amicus or PCLaw takes priority in Rate Value exchanges for these codes during initialization—the Rate Values will be automatically aligned for Amicus Timekeepers mapped to PCLaw Lawyers.

For example, consider a case in which all 20 Amicus Billing Rates have been mapped to PCLaw Rate Categories. A particular Timekeeper/Lawyer has only 5 of the Billing Rates assigned to him in Amicus Attorney for his use, but he has 8 Rate Categories in PCLaw.

- If the exchange is from PCLaw to Amicus, he will get 8 Amicus Billing Rates, as mapped.
- If the exchange is from Amicus to PCLaw, he will not lose any of his 8 Rate Categories in PCLaw.

When you are finished with this dialog, click Next.

Step 3d - Map PCLaw Types of Law with Amicus File Types

Map the PCLaw Types of Law to Amicus File Types. Add new PCLaw Types of Law (with Nicknames) or Amicus File Types if necessary.

Default File Type—If the Link has not yet been initialized, and you have many Amicus Files that do not have a File Type, you can select the default File Type to be assigned during initialization. Then click Next.

Step 3e - Map PCLaw Task Codes with Amicus Activity Codes

Map the PCLaw Task Codes to Amicus Activity Codes. Add new PCLaw Task Codes or Amicus Activity Codes if necessary. (If you wish to add, edit, or delete Amicus Activity Codes within the corresponding Amicus Firm Settings dialog, click the List button at the upper right.)

Rate Value priority—If the Link has not yet been initialized, specify whether Amicus or PCLaw takes priority in the Rate Value exchanges for these Codes during initialization. Then click Next.

Time Entries with a blank Activity Code—If you wish to allow users to post Time Entries that have a blank Activity Code, be sure to assign a default Task Code (such as "BW", for Billable Work) to all Matters. You can use the Global Change feature in PCLaw to perform this task.

Step 3f - Map PCLaw Types of Law with Amicus Task-Based Billing Code Sets

Map the PCLaw Types of Law to Amicus Task-Based Billing Code Sets. Add new Amicus Code Sets if necessary. Only the PCLaw Types of Law that are used for Task-Based Billing need to be mapped. All Amicus Code sets must be mapped. (If you wish to add, edit, or delete Amicus Code Sets within the corresponding Amicus Firm Settings dialog, click the List button at the upper right.) Then click Next.

Step 3g - Map PCLaw Task Codes with Amicus Task-Based Billing Task Codes

For each Amicus Task-Based Billing Code Set, map the PCLaw Task Codes to Amicus Task-Based Billing Task Codes. Add new PCLaw Task Codes or Amicus Task-Based Billing Task Codes if necessary. (If you wish to add, edit, or delete Amicus Task-Based Billing Task Codes within the corresponding Amicus Firm Settings dialog, click the List button at the upper right.)

Rate Value priority—If the Link has not yet been initialized, specify whether Amicus or PCLaw takes priority in the Rate Value exchanges for these Codes during initialization. Then click Next.

TIP: If Task-Based Billing is not used at your firm, it is not necessary to map these codes. Simply ignore, and click Next.

Step 3h - Map PCLaw Explanation Codes with Amicus Task-Based Billing Activity Codes

Map the PCLaw Explanation Codes to Amicus Task-Based Billing Activity Codes. (Only the PCLaw Explanations that have been set for use with Task-Based Billing and categorized for Time Entries are provided in the list.) Add new PCLaw Explanation Codes or Amicus Task-Based Billing Activity Codes if necessary. (If you wish to add, edit, or delete Amicus Task-Based Billing Activity Codes within the corresponding Amicus Firm Settings dialog, click the List button at the upper right.) Then click Next.

Step 3i - Map PCLaw Explanation Codes with Amicus Expense Codes

Map the PCLaw Explanation Codes to Amicus Expense Codes. (Only the PCLaw Explanations that have been set for use with Task-Based Billing and categorized for Expense Entries are provided in the list.) Add new PCLaw Explanation Codes or Amicus Expense Codes if necessary. (If you wish to add, edit, or delete Amicus Expense Codes within the corresponding Amicus Firm Settings dialog, click the List button at the upper right.) Then click Finish. The Welcome dialog reappears.

NOTE: The rate values for Expense Code and Explanation Code are not automatically aligned. You must align them manually.

Step 4 - Read about the field mapping and matching criteria

Click Step 4 in the Welcome dialog of the Link Configuration wizard to read about mapping and matching, and to set one option.

Several informational dialogs are provided as a quick reference on how:

- Amicus Contact and PCLaw Client fields are mapped
- Amicus File and PCLaw Matter fields are mapped
- Amicus Files and PCLaw Matters are matched
- Amicus Contacts and PCLaw Clients are matched

In the File/Matter Field Mapping dialog, select the option at the bottom if you do not want changes to the Responsible Lawyer field exchanged by the Link.

Initializing the Link

You are now ready to exchange information between Amicus and PCLaw. An Amicus Administrator performs the initialization (i.e. the first exchange).

1 **IMPORTANT**: Back up both the PCLaw database and the Amicus database.

2 Prepare your data in both applications (as outlined earlier in this Guide).

3 Ensure that all users are logged out of both Amicus and PCLaw.

4 To start initialization, first click Step 5 in the Welcome dialog of the Link Configuration wizard.
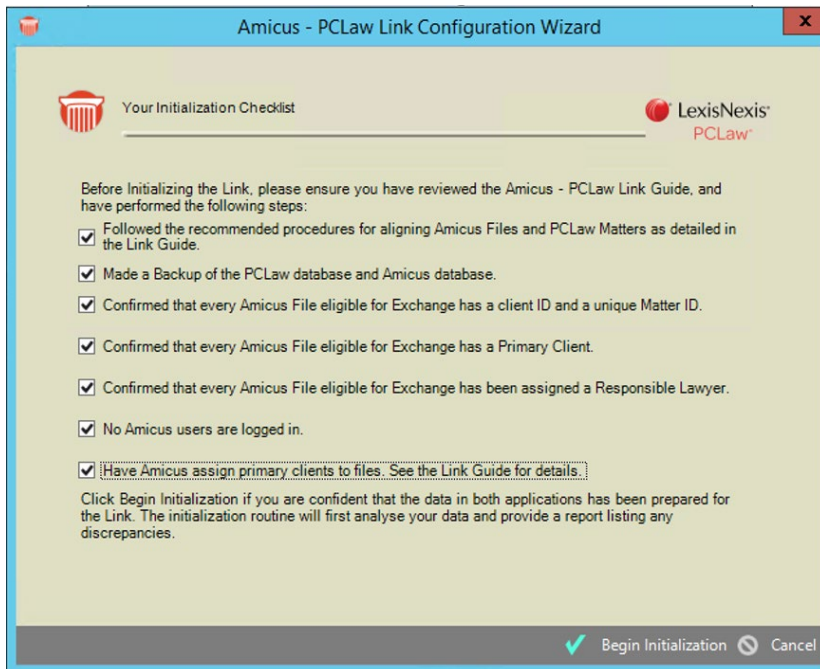
Click Begin Initialization in the Your Initialization Checklist dialog.

5 **Pre-initialization Check:** The Link checks Amicus data consistency to ensure that initialization will produce good results.

> **TIP:** The following checks are done on eligible Amicus Files (Files that are Open, are not flagged as Excluded, and have a mapped Responsible Lawyer). If you wish to deal with some Files individually AFTER initialization, flag them as Excluded from exchange.

Primary Client Designation: Some special processing is done first, to improve the data for firms who upgraded from Amicus Small Firm. In earlier versions there was no concept of a Primary Client on a File. Amicus Attorney lets the user designate a specific Client for exchange. During Database Conversion to Amicus Attorney , the Primary Client will be automatically set provided there is only one Client assigned to a File. If there is more than one Client, then this designation is not made at the time of Conversion. The PCLaw Link Pre-Initialization Check makes a more granular attempt at determining the Primary Client based on a variety of criteria involving Full Client Name and Client ID compared against all Clients assigned on the File:

- If a File does not have a Primary Client, and the name in the Full Client Name field matches one of the Contacts on the File, then that Contact is assigned as the Primary Client.

- If a Primary Client on a File has only a Last Name (i.e. no First Name, Initials, or Company Name) then they are switched from an Individual to a Company, and their name is moved from the Last Name field to the Company Name field.

If a determination still cannot be made, then the File will be reported in the Pre-Initialization error log noted below.

Basic checks: The following issues are checked for in Amicus Attorney:
- two or more Files that have the same Matter ID
- Files that do not have a both a Client ID and a Matter ID
- Files that do not have a Primary Client
- Files that do not have a Responsible Lawyer who is a Timekeeper
- two or more Primary Clients that have the same Client ID
- Primary Clients that have different Client IDs on different Files

Results:
- If the Pre-initialization Check fails, errors will be noted in an error log on the Amicus Attorney Application Server). <u>All issues must be resolved before initialization can take place.</u>

  The log is named `AmicusPCLaw.log` and is located in the folder accessed by choosing Amicus > (Amicus Attorney Tools >) Server Logs from the Windows Start menu
- If the data passes the Pre-initialization Check, initialization starts automatically as described below.

6 **Synchronizations and optional transfer:** The Link performs the following tasks:
- synchronizes Amicus Timekeeper Rates with PCLaw Lawyer Rates, in the direction specified
- synchronizes Amicus Activity Code Rates with PCLaw Task Code Rates, in the direction specified
- synchronizes Amicus Task-Based Billing Task Code Rates with PCLaw Task Code Rates, in the direction specified
- synchronizes Amicus Files with PCLaw Matters, and Amicus Contacts with PCLaw Clients, based on your preference

7 **Exceptions:** Further checks are done on the PCLaw data. Any "exceptions" encountered at this stage will not cause initialization to fail but will be detailed in the error log:
- PCLaw Matters (based on Matter ID) that are closed or excluded that match an Amicus File eligible for exchange, or vice versa.
- Matching PCLaw Matters where the Amicus Primary Client or the Client ID does not match the PCLaw Client. (Mismatched Client names are the most common exception. See "Preparing your data" on page 6).
- PCLaw Matters whose Responsible Lawyer is not mapped to an Amicus Timekeeper.
- PCLaw Matters with a Type of Law that is not mapped to an Amicus File Type.

For each of the mismatches listed in the error log, edit the Client Name in either PCLaw or Amicus as desired, and then exchange the individual File/Matter.

The link can be used immediately following completion of the initialization process, including posting time and expenses, and performing global and per-file exchanges. However, Amicus Files with discrepancies will be skipped during global or per-file exchanges until the necessary adjustments are made.

TIP ON EXPOSING CLIENT IDS: You can expose the Client ID field for Contacts in the People Index by right-clicking on the column header, and selecting "Show Fields". If you have security rights to see all Firm Contacts, be sure to select that filter option in the Control Panel, otherwise you will be seeing only your Contacts.

Initialization and exchange details

The Link exchanges information: Amicus Files with PCLaw Matters, and Amicus Contacts with PCLaw Clients. The following sections describe **how records are matched**, and **how fields are mapped** in order to facilitate the proper supply of information to the records that are updated or created in the other application.

For a complete list of field mappings, see "Preparing your data" on page 6.

Exchange methods

There are two exchange methods:

- **Individual File exchange**—involves a single Amicus File (and its Primary Client Contact record) with the corresponding PCLaw Matter and Client. Individual File exchange is performed from the Accounting Link Details view of the File Detail in Amicus Attorney.

- **Global exchange**—involves additions or modifications since the last exchange in either database involving all eligible Amicus Files and Contacts and PCLaw Matters and Clients

Exchange direction

The Link Configuration wizard allows you to set which application takes priority for the purposes of those records types that involve a bi-directional exchange during initialization. You can also set the priority for subsequent exchanges.

Match Criteria

Eligible records that meet the scope requirements (see "Scope" on page 3) are matched based on the *Key Identifiers* in each record. This matching is not case sensitive, but spaces and punctuation do matter.

- **If a match is not found**, the Link will create a new record, so that there are corresponding records in both databases.

- **If one match is found**, either the Amicus record or PCLaw record is updated. Where a record has been changed in both applications, conflicts are resolved based on the Link priority options set by the Amicus Administrator.

- **If more than one match is found**, an error is logged.

File/Matter record match criteria

A Matter in PCLaw is the equivalent of an Amicus File.

> **NOTE:** PCLaw and its API allow Matter IDs up to 12 characters long. The following characters cannot used in IDs: * / \ < > " ? |

Key identifiers

Client IDs and Matter IDs are the key identifiers of Amicus Files and PCLaw Matters, and therefore provide the basis of File/Matter matching.

For an Amicus File to match a PCLaw Matter, the Client ID and Matter ID in each record must match. This matching is not case sensitive.

Client IDs and Matter IDs are handled in Amicus Attorney as follows:

- Each Amicus File is identified by a Client ID and Matter ID.

- Each Amicus Client is identified by a Client ID. The Client ID is a property of a Contact record—there is only a single Client ID per Contact record, and multiple Contact records cannot have the same Client ID
- Assigning a Contact who has a Client ID as the Primary Client on a File determines the Client ID for that File.

Additionally, a secondary check on Client Name is optionally done during initialization. If this option is selected in the Link Configuration wizard, then once a File/Matter matches on Client and Matter IDs, the Primary Client's Name in Amicus Attorney is compared to the Client's Name in PCLaw. If the names do not match exactly, the File/Matter will not be exchanged during initialization unless you choose to exclude this secondary name check.

File/Matter field mapping

The following field mapping is used when an Amicus File is created or updated from a PCLaw Matter, or vice versa.

Amicus File field	PCLaw Matter field
Client ID	Client ID
Matter ID	Matter ID
Full Matter Name	Matter Description
Responsible Lawyer *(optional in record updates)*	Responsible Lawyer *(optional in record updates)*
File Type *(only in new records)* [1]	Type of Law *(only in new records)* [1]
File Opened Date *(only in new records)* [1]	Date Opened *(only in new records)* [1]
File Billing Rate	Matter Default Rate
Use Task-Based Billing	Use Task-Based Billing
Task-Based Billing Set	Type of Law
Matter Billing Address [2]	Matter Billing Address [2]

1 Updates are not supported.
2 This field is shown in the Billing Info view of the File Details in Amicus. The Matter Secondary Billing Address, if any, is not exchanged or shown.

Responsible Lawyer assignments

The Responsible Lawyer assignment is exchanged always in new records.

If the Amicus Administrator has set the Link option to do so, the Responsible Lawyer assignment is also exchanged when an Amicus File or PCLaw Matter is updated.

Firm Member assignments to Amicus Files

If a new Amicus File is created from a PCLaw Matter, the Matter's Responsible Lawyer is assigned to the File. In addition, the Firm Members who are specified in that Responsible Lawyer's Amicus Preferences as the ones to be assigned by default to new Files are assigned to the File.

Short File Name in Amicus

If a **new Amicus File** is created from a PCLaw Matter (during an exchange), the Amicus Short File Name is constructed from the PCLaw Matter information as follows:

> *Client Last Name* <small><COMMA></small> <small><SPACE></small> *Client First Name* <small><SPACE></small> <small><HYPHEN></small> <small><SPACE></small> *Matter Description*

For example, a generated Amicus Short File Name might be:

```
Berwood Construction Ltd. - Wrongful dismissal.
```

Client record match criteria

A Client in PCLaw is the equivalent of an Amicus Primary Client on a File.

NOTE: PCLaw and its API allow Client IDs up to 6 characters long. The following characters cannot used in IDs: `* / \ < > " ? |`

Key identifiers

Amicus-to-PCLaw exchange:

The Link considers only the Primary Client on Amicus Files that are eligible for exchange (see "Scope" on page 3), and checks for a PCLaw Client ID that matches the Amicus Client ID. (If unsuccessful, the Link creates a new Amicus Contact record for the client.)

PCLaw-to-Amicus exchange:

This exchange considers only the PCLaw Clients who have Matters that are eligible for exchange (see "Scope" on page 3), and checks for an Amicus Client ID that matches the PCLaw Client ID.

- If a Contact match is found this way, and the Amicus File matches the PCLaw Matter (as described above, in "File/Matter record match criteria", and the Amicus Contact is the Primary Client on that File, then the match is successful.

- If a Contact match is not found this way, then the following match criteria are used, based on whether the Amicus Contacts and PCLaw Clients are considered to be companies or individuals:

  - **Companies:** If the PCLaw Client has a Last Name only, a Firm Name only, or a Last Name and Firm Name but no First Name, then an Amicus Contact record must be a Company.

    NOTE: If a PCLaw Client has a Last Name only (with or without a Firm Name), and its PCLaw Display As status is "Person", the Link considers the Client to be a company. To avoid confusion, we therefore recommend that you avoid this combination of PCLaw settings.

    Key Identifier fields if the PCLaw Client has no First Name:

Amicus Contact field	PCLaw Client field
Company Name	Firm Name *or* Last Name (if no Firm Name)
Business Phone *or* Primary Phone	Business
Business Address City *or* Primary Address City	Address City

– **Individuals:** If the PCLaw Client has a First and Last Name (with or without a Firm Name) and its PCLaw Display As status is "Person" rather than "Corporation", then an Amicus Contact record must be an Individual.

Key Identifier fields if the PCLaw Client has a Last Name and First Name:

Amicus Contact field	PCLaw Client field
First Name	First Name
Last Name	Last Name
Home Phone *or* Primary Phone	Home
Home Address City *or* Primary Address City	Address City

Phone format

As noted above, Phone information may be part of the Key Identifier for PCLaw-to-Amicus record match criteria.

Amicus Phone information is divided into four components: Country Code, Area Code, Local Number, and Extension. PCLaw Phone information is in one, undivided field.

To ensure proper matching, use any the following formats (whichever is appropriate for the Client or Contact) when entering Phone information in PCLaw:

+*CountryCode* <SPACE> **(***AreaCode***)** <SPACE> *LocalNumber* <SPACE> **x***Extension*
+*CountryCode* <SPACE> **(***AreaCode***)** <SPACE> *LocalNumber*
(*AreaCode***)** <SPACE> *LocalNumber* <SPACE> **x***Extension*
(*AreaCode***)** <SPACE> *LocalNumber*
LocalNumber <SPACE> **x***Extension*
LocalNumber

Note that a space is required between each division, a Country Code must be preceded by a plus sign, an Area Code must be surrounded by parentheses, and an Extension must be preceded by an "x".

Amicus Contact / PCLaw Client field mapping

The mapping of Amicus Contact and PCLaw Client fields depends on whether a new Amicus Contact record is being created or not.

Individuals or Companies

The mapping is affected by whether the Contacts/Clients are individuals or companies.

- A **PCLaw Client** who has a Last Name and First Name (with or without a Firm Name), and also has the PCLaw Display As status of "Person", is considered an individual. All other PCLaw Clients are considered companies.

- An **Amicus Contact** is designated as either an Individual or a Company.

Creating or updating a PCLaw Client from an Amicus Contact

The following field mapping is used when a PCLaw Client is created or updated from an Amicus Contact.

Amicus Contact field	Amicus Contact Type		PCLaw Client field
First Name and Last Name only *(no Company Name)*	Individual		First Name and Last Name Display As "Person"
Last Name only *(with or without Company Name)*	Individual		Firm Name *(from Amicus Last Name)* Display As "Corporation" *(Amicus Company Name does not exchange)*
First Name, Last Name, and Company Name	Individual		First Name and Last Name Display As "Person" *(Amicus Company Name does not exchange)*
Company Name only	Company		Firm Name *(from Amicus Company Name)* Display As "Corporation"
Business Phone	Company or Individual		Business
Home Phone	Company or Individual		Home
Cell Phone	Company or Individual		Cell
Primary Fax	Company or Individual		Bus. Fax
Primary E-mail	Company or Individual		E-mail
Primary Address	Company or Individual		Client Address

Creating or updating an Amicus Contact from a PCLaw Client

PCLaw Client field	PCLaw Client Display As status	Amicus Contact field	Amicus Contact Type
First Name and Last Name only	Person	First Name and Last Name	Individual
Last Name only	Person	Company Name *(from PCLaw Last Name)*	Company
Last Name only *(with Firm Name)*	Corporation	Company Name *(from PCLaw Firm Name)* *(PCLaw Last Name does not exchange)*	Company
Firm Name *(with First Name and Last Name)*	Corporation	Company Name *(from PCLaw Firm Name)* *(PCLaw First Name and Last Name do not exchange)*	Company

PCLaw Client field	PCLaw Client Display As status	Amicus Contact field	Amicus Contact Type
Firm Name only	Corporation	Company Name *(from PCLaw Firm Name)*	Company
Business	Corporation or Person	Business Phone	Company or Individual
Home	Corporation or Person	Home Phone	Company or Individual
Cell	Corporation or Person	Cell Phone	Company or Individual
Bus. Fax	Corporation/Person	*If Amicus Contact created:* Business/Home Fax *If Amicus Contact updated:* Primary Fax	Company or Individual
E-mail	Corporation/Person	*If Amicus Contact created:* Business/Home E-mail *If Amicus Contact updated:* Primary E-mail	Company or Individual
Client Address	Corporation/Person	*If Amicus Contact created:* Business/Home Address *If Amicus Contact updated:* Primary Address	Company or Individual

Note: Home or Business Fax, E-mail, and Address created in the new Amicus Contact are automatically designated to be the **Primary** Fax, E-mail, and Address.

Firm Members assigned to Amicus Contact records

If an Amicus Contact is created or updated from a PCLaw Client, the Firm Members who are assigned to the Amicus File on which this Contact is the Primary Client are automatically assigned to the Contact.

About Rates

PCLaw Rate Categories are mapped to Amicus Billing Rates in the Link Configuration wizard. You can specify whether Amicus or PCLaw takes priority in Rate Values exchanges for these codes during initialization—the Rate Values will be automatically aligned for Amicus Timekeepers mapped to PCLaw Lawyers.

This affects the posting of Time Entries with valid Rates, and the exchange of Rate information on Files.

About Time Entries

Time Entries in Amicus are exchanged with PCLaw in one direction—from Amicus to PCLaw. Time Entries are sent to PCLaw through the Posting function in the Time module and not through the Exchange function in the Office module. This model maintains 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.

The following table shows what information is exchanged to PCLaw, depending on the Billing Category and Billing/Time Tracking Rate assigned in the Amicus Time Entry. We recommend that you exclude

Non-Billable Files (including Vacation and Personal Files) from exchanging to PCLaw because Time Entries would not be marked Non-Billable in PCLaw.

Amicus		PCLaw		
Billing Category	Billing/Time Tracking Rate	Duration	Rate	Amount
Fixed Fee or Contingency	File Fee or Flat Rate	0	Total Fee	Total Fee
Fixed Fee or Contingency	Normal, etc.	Duration	Rate	Total Fee
Fixed Fee or Contingency	Other	Duration	Rate Value	Total Fee
Billable [1]	Flat Rate	0	Total Fee	Total Fee
Billable [1]	Non-Billable	Duration	0	0
Billable [1]	Normal, etc.	Duration	Rate	Total Fee
Billable [1]	Other.	Duration	Rate Value	Total Fee

1 Billable = Billing Categories assigned the "Billable" attribute, excluding Fixed Fee and Contingency.

Maintaining the Link

The common lists

Making the effort to ensure that data is consistent on both sides of the link before initialization will keep the exchange of data between Amicus Attorney and PCLaw running smoothly and accurately. Internal logic will keep Amicus Files and Primary Clients properly linked and eliminate the inadvertent creation of duplicates. For ongoing maintenance, as rates or any common list items are added, ensure that they are mapped.

The Amicus Administrator and PCLaw Administrator must maintain the common lists of Amicus Timekeepers/PCLaw Lawyers, Amicus File Types/PCLaw Types of Law, and so on. For a table of these lists, see "Preparing your data" on page 6.

For example, if you add a File Type in Amicus Attorney, you will need to add a corresponding Type of Law in PCLaw too, and then map the two items. Note that for many items (as indicated in the table of lists), you can use the convenient Add feature in the Link Configuration wizard to transfer the new list items you create in one program directly to the other program, without having to manually create them. Care should be taken when deleting common list items in either application as existing data may be affected. We recommend that before deleting common list items in PCLaw, you first unmap them using Step 3 of the Link Configuration wizard.

NOTE: You do NOT need to reinitialize or reset the Link after changing the mapping in the Link Configuration wizard.

Billing Rates

If you assign Billing Rate values to Amicus Activity Codes (or PCLaw Task Codes), or Amicus Task-Based Billing Activity Codes (or PCLaw Task Codes), and then add these new codes via the Add feature in the Link Configuration wizard, the Rate values will be automatically transferred as well.

However, in the following cases you must enter the Rate values manually, in both programs:

- any changes to the Rates in existing items
- the Rates in new Amicus Timekeepers or PCLaw Lawyers
- the new Amicus Expense Codes or PCLaw Explanation Codes

Resetting the Link

The Amicus Administrator can reset the Link when necessary. This unlinks all Amicus Files with PCLaw Matters.

WARNING: We highly recommend that you reset the Link only with the assistance of LexisNexis (at 1-800-387-9785), or Amicus Technical Support (at 1-800-472-2289). The Link should be reset only under the following conditions:

- After recovering your Amicus database or PCLaw database, or
- After restoring a backup in Amicus Attorney or PCLaw

To reset the Link, perform the following steps:

1 **IMPORTANT**: Back up the PCLaw database and the Amicus database before resetting the Link.

2 Ensure that all users are logged out of both Amicus Attorney and PCLaw.

3 Choose Firm Settings on the navigation list in the control panel the Office module. The Firm Settings view appears.

4 Choose Time > Accounting in the view. The Accounting System view of the Firm Settings dialog appears.

5 Click Configure to run the Link Configuration wizard.

6 Click Step 1 in the Welcome dialog of the Link Configuration wizard. The Data Source dialog appears.

7 Select the Yes option in the Reset Link section at the bottom of the dialog, and then click Finish. The Link is reset.

8 After resetting the Link, you will need to repeat Steps 2 to 5 in the wizard and initialize the Link again in order to resume sharing data with PCLaw.

Configuring your system to handle Server restarts

Whenever the Amicus Server Service is restarted, someone must **manually** log in to Windows at the Server before Amicus Attorney and PCLaw may communicate. For convenience, however, you can configure your system to eliminate that task, as detailed below, **after you have configured the Link**.

Limitations of this configuration

- If the Windows User Name or Password of the administrator configured below changes, the Services and component must be reconfigured accordingly.

- If PCLaw is launched at the Server, either directly or via a Remote Desktop session, by someone logged in under different Windows credentials, then Amicus will not be able to communicate with PCLaw (and the Link will not be available to any Amicus users).

- Amicus Attorney cannot be used at the Server by anyone logged in under different Windows credentials.

Step 1 - Ensure that your Amicus Attorney Application Server is configured to automatically log in an administrator account

- This user must be a member of the "Administrators" and "Distributed COM Users" Groups.

## Step 2 - Configure the Amicus Server Service to use the same administrator's User Name and Password

1   Ensure that all users are logged out of both Amicus Attorney and PCLaw.

2   Restart the Server.

3   Log in to the Server as the same administrator as configured in Step 1.

4   Go to the Windows Control Panel, double-click Administrative Tools, and then double-click Services.

5   Right-click on "Amicus Service Server" and choose Properties on the shortcut menu. Click the Log On tab in the dialog that appears.
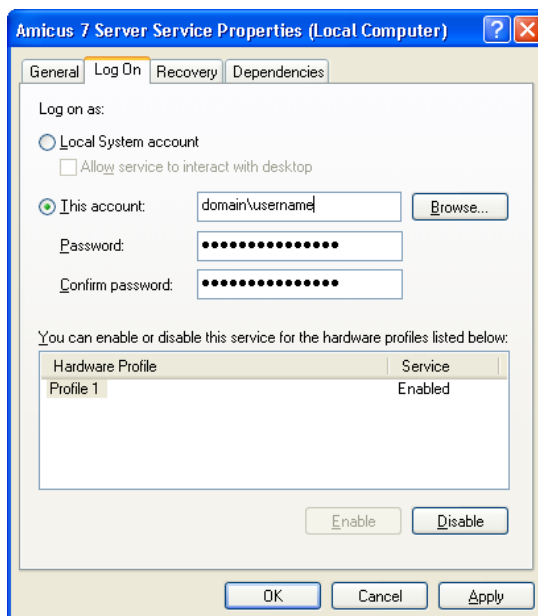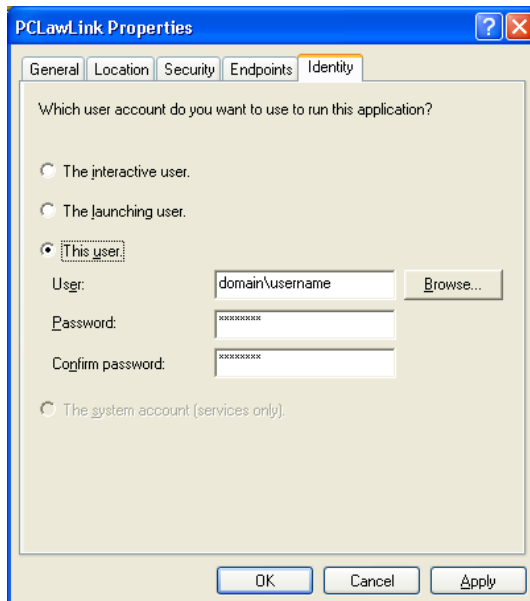

6   Select the Log on as "This account" option, enter the same Administrator's domain and User Name, and then enter and confirm their Password. Click OK.

Step 3 - Configure the PCLawLink DCOM component to use the same administrator's User Name and Password

1   Choose Run from the Windows Start menu, type `dcomcnfg`, and click OK.

2   In the Component Services window that appears, expand the folders at the left: Component Services > Computers > My Computer > DCOM Config.
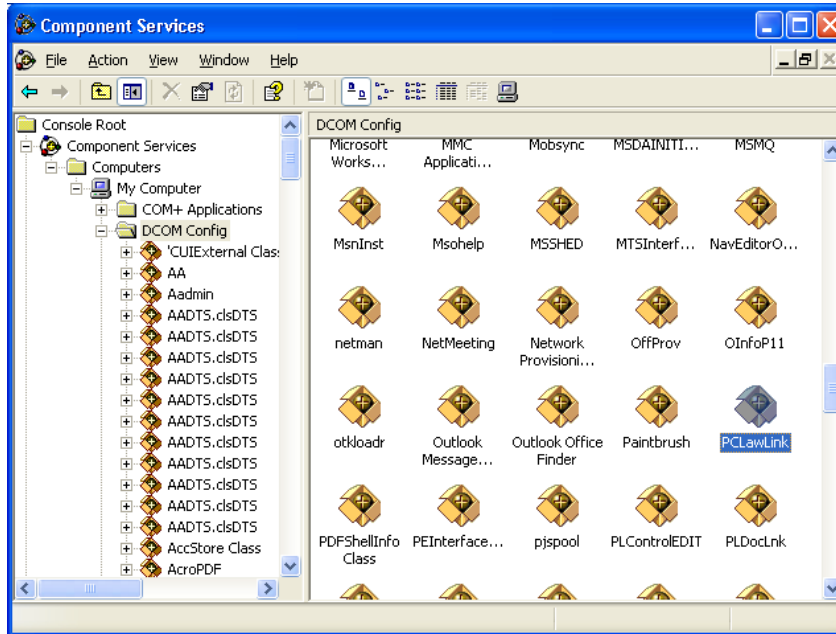

3   In the list at the right, right-click on PCLawLink and choose Properties on the shortcut menu. Click the Identity tab.

4   In the dialog, select the "This user" option, enter the same Administrator's domain and User Name, and then enter and confirm their Password. Click OK.

Step 4 - Install the PCLaw Link as a Windows Service and configure it to use the same administrator's User Name and Password

1   Choose Run from the Windows Start menu.
- If using PCLaw below Release 8.2, type `plsvclnk -i`, and click OK.
- If using PCLaw Release 8.2 or higher, click Browse, navigate to
  `\Program Files\LexisNexis\PCLaw\`, highlight `plsvclnk.exe`, and click OK.
  Then type `-i` in the Run box and click OK.
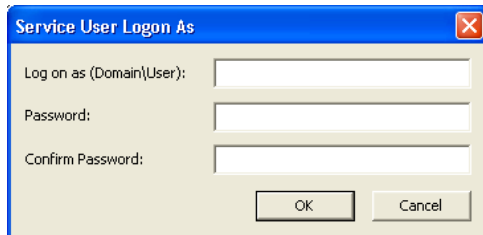
2   In the dialog that appears, enter the Administrator's domain and User Name, and then enter and confirm their Password. Click OK.

Step 5 - Install the PCLaw Logger Services as a Windows Service and configure it to use the same administrator's User Name and Password

1   Choose Run from the Windows Start menu.
- If using PCLaw below Release 8.2, type `plsvclog -i`, and click OK.
- If using PCLaw Release 8.2 or higher, click Browse, navigate to
  `\Program Files\LexisNexis\PCLaw\`, highlight `plsvclog.exe`, and click OK.
  Then type `-i` in the Run box and click OK.
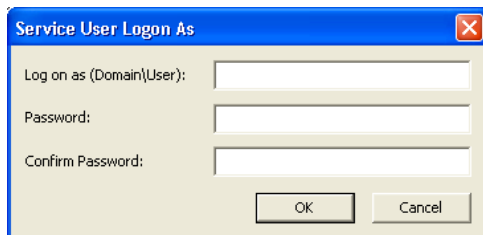
3   In the dialog that appears, enter the Administrator's domain and User Name , and then enter and confirm their Password. Click OK.

4   Restart the Server.

Using the Link

Once the Amicus Administrator has configured and initialized the Amicus Attorney-PCLaw Link, Amicus Attorney and PCLaw users can use the Link functions in various ways, including:

- Using Client IDs in Amicus Attorney
- Adding a File in Amicus Attorney and sending it to PCLaw.
- Using the Accounting Link Details view of a File in Amicus Attorney to exclude the File from exchanges or unlink the File from a PCLaw Matter.
- Using the Billing Info view of a File in Amicus Attorney to change the PCLaw Matter address information.
- Using the Fees & Disbursement and Trust & A/R views of a File, or the Account Inquiry view of a Contact, in Amicus Attorney.
- Doing an individual File exchange from Amicus Attorney (your Amicus Administrator can also do global File exchanges).
- Creating and posting Time Entries from Amicus Attorney.
- Creating and posting Expenses from Amicus Attorney.

Using Client IDs in Amicus Attorney

Client IDs are shown in the File Details dialog, Files Index, Person Edit dialog, and People Index.

- *If the Amicus Contact is NOT linked to a PCLaw Client*, you may create or edit their Client ID from File Details (in which the Contact is assigned as the Primary Client). For more information, see the next section. Additionally, you may delete their Client ID from Person Edit (by clicking the Clear button next to the field).

- *If the Amicus Contact is linked to a PCLaw Client*, you may only delete their Client ID—from Person Edit (by clicking the Clear button next to the field). This enables you to undo an incorrect ID assigned by mistake. You may then go to File Details and enter the correct ID.

Adding a File in Amicus Attorney

IMPORTANT: Follow the firm's policy on creating all new Files either in Amicus only or in PCLaw only. Note that if you add a File in Amicus, you can send it to PCLaw immediately upon creation, but if you add a Matter in PCLaw, a global exchange is required to send it to Amicus.

When you add a new File in Amicus, it must contain certain required information in order for it to be eligible for exchange with a PCLaw Matter. This required information is: Primary Client, Client ID, Matter ID, Responsible Lawyer, and File Type.

From the Admin > General view of the Amicus File:

- To identify the Primary Client, you can click the Select People button under the Primary Client heading, select a Contact in the dialog that appears, and click OK. The Client ID field is automatically filled in if possible—if the Amicus Contact is already linked to a PCLaw Client, this is the existing Client ID; otherwise this is a new Client ID generated from PCLaw (if possible).

  Alternatively, you can click the Select PCLaw Client button next to the Client ID field, select a PCLaw Client in the dialog that appears, and click OK. If the Client is already linked to an Amicus Contact, then that Contact is assigned as the Primary Client and their Client ID is automatically filled in. If the Client is not already linked to an Amicus Contact, then a message tells you that a Contact record will be created when the File is exchanged, the Contact is assigned as the Primary Client and their Client ID is automatically filled in.

Assigning the Primary Client via the Select PCLaw Client button is especially useful if you use PCLaw Pro and suspect or know that you have PCLaw Clients without any Matters.

- If PCLaw has automatic Matter numbering enabled, a Matter ID is automatically obtained from PCLaw (if possible) and filled in. Otherwise, you must enter a unique Matter ID.

- To identify the Responsible Lawyer on the File, you can click the Select People button under the Responsible Lawyer heading, select a Contact in the dialog that appears, and click OK.

- Enter a unique Short File Name and select a File Type as well.

NOTE: If you create a File based on another File that has a Primary Client, the Primary Client is automatically assigned in the new File.

NOTE: If PCLaw automatically provides a Matter ID for the new Amicus File, we recommend that you perform an exchange before adding any new Matters in PCLaw. This is to avoid the assignment of a duplicate ID within PCLaw.

Saving the new File

When you save the File, you are prompted "Do you wish to send this Client and File information to PCLaw now?"

If you click Yes, and all required fields are present (Primary Client, Client ID, Matter ID, Responsible Lawyer, File Type, and Short File Name), then the File will be saved and sent to PCLaw.

If you click No, the File will be saved. The Exclude This File checkbox is automatically selected (in the Accounting Link Details view), and any newly generated and assigned Client ID or Matter ID are automatically cleared. Later, you can clear the Exclude checkbox and then proceed to exchange the File with PCLaw.

Using the Accounting Link Details view

The Accounting Link Details view of the File Details window shows how the Amicus File is linked to a record in PCLaw, provides a checkbox to exclude this File from the Link, and provides an Exchange button to synchronize the File with the corresponding Matter in PCLaw.

To see the Link Details, open the File Details window and choose Admin > Link Details on the navigation list in the control panel.

Excluding an Amicus File from the Link

To exclude an Amicus File from exchanges, select the Exclude This File checkbox. Or, select one or more Files in the Files Index window, right-click on the list, and choose Exclude From Accounting Link in the shortcut menu that appears. If the File is already linked to a PCLaw Matter, the link with the corresponding PCLaw Matter is maintained but the File is excluded from any future exchanges.

We recommend that you also exclude the corresponding PCLaw Matter from exchanges, by selecting its Disable Updates With Other Software option (or by deactivating or archiving it).

Clearing the Exclude This File checkbox will make the File eligible for exchange. If the File is already linked to a PCLaw Matter, be sure that the PCLaw Matter is not excluded from exchanges (by clearing its Disable Updates With Other Software option) and is neither Inactive nor Archived. A prompt may appear, informing you of any other requirements before the File may be included in the next exchange, such as assigning a unique Client ID and/or Matter ID.

Unlinking an Amicus File from a PCLaw Matter

To unlink an Amicus File from a PCLaw Matter, perhaps because the wrong records were linked by mistake, you can click Unlink in the Amicus File's Link Details dialog. This breaks the link between the Amicus File and the PCLaw Matter. The link between the Amicus Primary Client on the File and the PCLaw Client is maintained only if that Primary Client is also the Primary Client on other Files that are linked to PCLaw Matters.

If you want to prevent the link from being automatically reestablished on the next exchange (by match criteria), select the Exclude This File checkbox in the Amicus File, and select the Disable Updates With Other Software option in the corresponding PCLaw Matter.

Exchanging an individual File

One method of exchanging an Amicus File with a PCLaw Matter is the individual File exchange. This involves a single File along with its Primary Client's Contact record, and the corresponding PCLaw Matter and Client.

To exchange a single File, you can open the **File Details window** and choose Accounting File Exchange on the Actions menu. Or, click Exchange in the Link Details view of File Details.

NOTE: It is not necessary for Amicus Attorney users to be logged out 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 PCLaw during an exchange, please consult your PCLaw documentation.

Global exchange

Your Amicus Administrator can do a global exchange if they have rights to access Firm Files. A global exchange involves all Files/Matters and Contacts/Clients added or modified since the last exchange in either database.

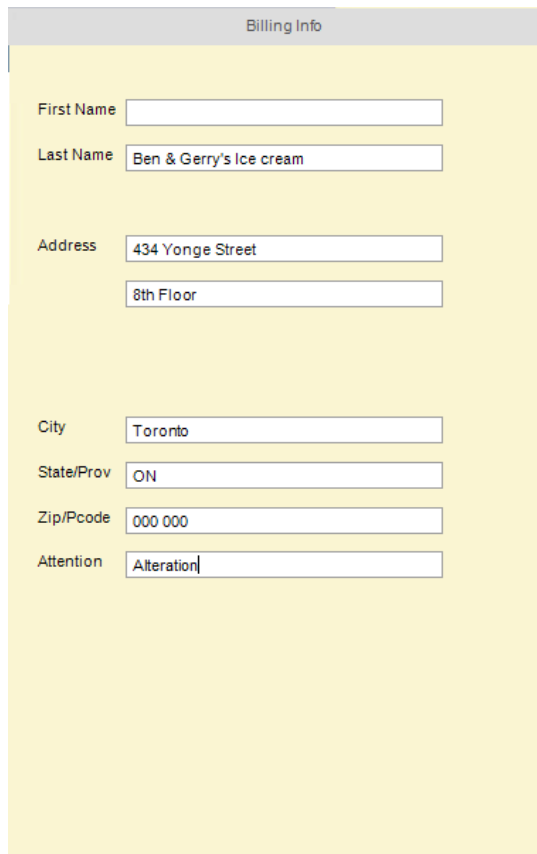To do a global exchange, go to the **Office module** and choose Accounting Exchange on the Actions menu.

NOTE: It is not necessary for Amicus Attorney users to be logged out 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 PCLaw during an exchange, please consult your PCLaw documentation.

Viewing and changing Matter billing address information

The Billing Info view of File Details shows the PCLaw Matter billing address information, which may be different from the Client address information. (A PCLaw Matter might also have a secondary billing address, but that information is neither exchanged nor shown in Amicus Attorney.)

To see the Billing Info view, open the File Details window and choose Admin > Billing Info on the navigation list in the control panel.

This billing address is synchronized on exchange. You can edit it in either PCLaw or Amicus Attorney.

Viewing PCLaw account information

If your Amicus Administrator has set up a PCLaw Accounting Link, account inquiry views are available in the File Details and Person Details windows of Amicus Attorney. These views show the account balances in the PCLaw Matters.

Inquiring from a File

The account inquiry views on a File show account balances from the PCLaw Matter that is linked to the File. Any dates that are not set in PCLaw will appear as "None".

To see the Fees & Disbursement or Trust & A/R view of a File, open the File Details window and choose Admin > Fees & Disbursement or Trust & A/R on the navigation list in the control panel.

Fees & Disbursements	
Account Inquiry	
Fees	
Last Fee Date	N\a
Unbilled Fees	$0.00
Total Billed Fees	$0.00
Total Fees	$0.00
Total Tax on Fees	$0.00
Unbilled Hours	0.00
Total Billed Hours	0.00
Total Hours	0.00
Disbursements	
Last Disbursement	N\a
Unbilled Disbursements	$0.00
Total Billed Disbursements	$0.00
Total disbursements	$0.00
Total Tax on Disbursements	$0.00

Trust & A/R	
Account Inquiry	
Trust	
Last Trust	N\a
Trust Balance 0	$0.00
Trust Balance 0	$0.00
Trust Balance 0	$0.00
Trust Balance 0	$0.00
Trust Balance 0	$0.00
Total Trust Balance	$0.00
A/R	
Last Billed	N\a
Last Receipt Date	N\a
Last Receipt Amount	$0.00
Total Billed Receipts	$0.00
Total Receipts	$0.00
Retainer Balance	$0.00
A/R Balance	$0.00

Inquiring from a Contact

The Account Inquiry view on a Contact shows the account balances summarized from all PCLaw Matters that are linked to all Files on which the Contact is the Primary Client. Any dates that are not set in PCLaw will appear as "None".

To make an account inquiry on a Contact, open the Person Details window and choose Account Inquiry on the navigation list.

Re-activating an Archived Matter in PCLaw

To fully re-activate an Archived Matter in PCLaw so that it will be exchanged, you must physically open the Matter record, make a change, and Save the change.
If the Matter used to be linked to an Amicus File, ensure that the File is Open, not excluded, and not currently linked to another PCLaw Matter.

Posting Time Entries to PCLaw

You can post Time Entries directly from Amicus Attorney to PCLaw, from the Time module. In order to post a Time Entry successfully, the following conditions must be met:

- The Amicus File associated with the Time Entry must already be linked to, and exchangeable with, a PCLaw Matter—the link could have been established by an exchange or by the saving and sending of a new File.

- The Timekeeper who owns the Time Entry must map to a valid PCLaw Lawyer.

- The Time Entry's Activity Code (or Task-Based Billing Task Code) must map to a valid PCLaw Task Code.

- If using Task-Based Billing, the Time Entry's Task-Based Billing Activity Code must map to a valid PCLaw Explanation Code.

The Time Entry's rate and time are transferred. Make sure your Amicus Attorney preferences for minimum and rounding up times are set appropriately. For more information about posting Time Entries, see the "Time" topic of the online User Help.

Non-Timekeepers cannot post Time Entries from their own Office. However, any Firm Member with permission may open a Timekeeper's Office in Amicus Attorney and post Time Entries for that Timekeeper.

Working with Expenses on a File

You can add Expenses on a File in Amicus Attorney and post them to PCLaw. This information is not part of your Time Sheets and does not affect the Time Statistics.

To see the Expenses, open the File Details window, choose Time Spent on the navigation list in the control panel, and then choose one of the views:

- My Expenses—your Expenses on the File
- All File Expenses—all Firm Members' Expenses on the File

New	My Expenses	Delete

Arranged By: Date/Time   Oldest on Top▲

Posted:	$0.00
Unposted:	$0.00
Total Expenses:	$0.00

Post

The list includes both posted and unposted Expenses. The total monetary value of the listed Expenses on the File (posted, unposted, and both) is shown below the list.
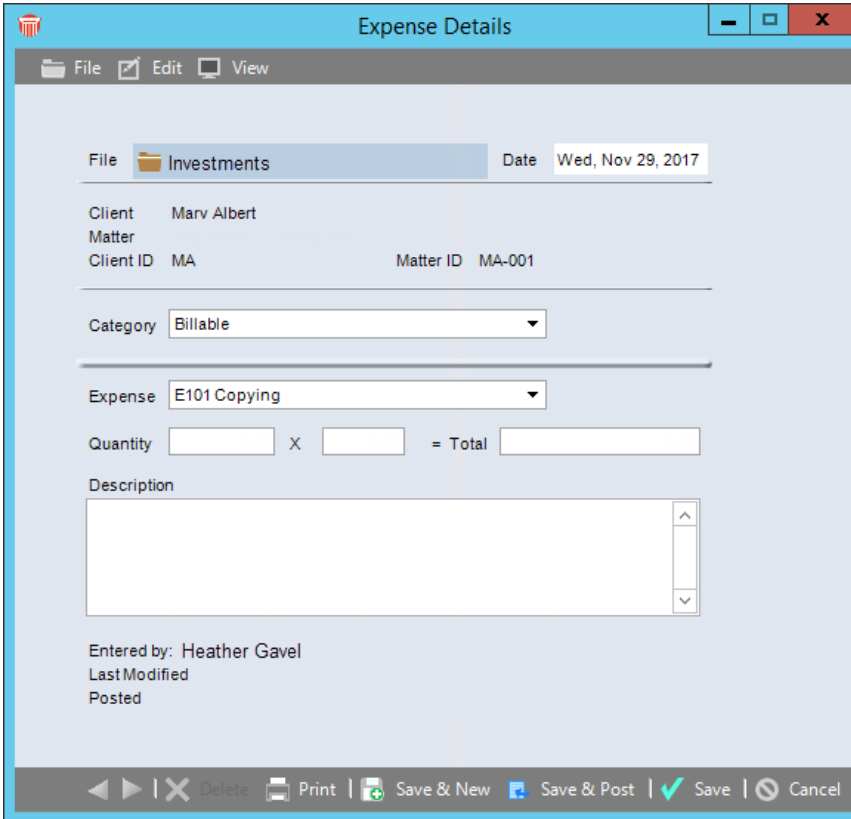
Viewing the details of an Expense

To see details of an Expense, double-click it in the list. Or, select the Expense, right-click on the list, and choose Open on the shortcut menu that appears.

Creating a new Expense

To create a new Expense, click New in the Expenses view. Or, select the Expense, right-click on the list, and choose New on the shortcut menu that appears.

Fill in the details of the Expense in the Expense Details dialog that appears.

Posting Expenses to PCLaw

You can post Expenses directly from Amicus Attorney to PCLaw. In order to post an Expense successfully, the following conditions must be met:

- An Amicus File must be associated with the Expense.

- The Amicus File associated with the Expense must already be linked to, and exchangeable with, a PCLaw Matter—the link could have been established by an exchange or by the saving and sending of a new File.

- The Amicus Timekeeper who owns the Expense must map to a valid PCLaw Lawyer.

- The Expense's Amicus Expense Code must map to a valid PCLaw Explanation Code.

To post one or more Expenses, select them in the My Expenses view and then click Post at the bottom right. Or, click Post in an Expense Details dialog.

Non-Timekeepers cannot post Expenses from their own Office. However, any Firm Member with permission may open a Timekeeper's Office in Amicus Attorney and post Expenses for that Timekeeper.

March 2024