Amicus Small Firm Utility:
Accounting Integration Consistency Checker

Applies to:
- Amicus Small Firm V+ and above

Contents

Who should use this utility

- Firms who are upgrading to **Amicus Attorney**.
- Firms who are experiencing "cross-linked" or other consistency issues**.**
- The utility is run *automatically* as a pre-initialization check process when you configure Amicus Small Firm to integrate with Amicus Small Firm Accounting and have NOT selected the Amicus Accounting option for Client Matter ID auto-numbering.

The utility performs tests only if your current Accounting System configuration setting is PCLaw, QuickBooks or Amicus Accounting.

Overview

The Checker enables you to test your Amicus Small Firm database for data inconsistencies. If you use Amicus Accounting, PCLaw, or QuickBooks and intend on upgrading to Amicus Attorney, inconsistencies should be corrected BEFORE converting your database and initializing the accounting link there.

All Files eligible for accounting exchange are examined:

- If configured for Amicus Accounting or PCLaw integration, eligible Files are those that are both Open and do not have the Exclude From Link checkbox selected.
- If configured for QuickBooks integration, eligible Files are those that are Open.
- The "Personal - Vacation" and "Personal - Illness" Files are not eligible.

Copy the utility if necessary

The following table indicates where the utility file (**`AmicusAccntChecker.EXE`**) is provided.

Copy the file to the indicated folder on the computer of a Team Member with wide access to Amicus Files so that they may conveniently open any problem Files for viewing and/or editing directly from the utility. If that's the computer where Amicus Administrator is installed, there's no need to copy the file.

Version	Utility located in	Copy utility to appropriate workstation location if necessary

Small Firm 2016	`\AMICUS\AMICUS ATTORNEY SMALL FIRM 2016 TEAM \AMICUS`
	`(or \AMICUS\AMICUS ATTORNEY SMALL FIRM 2014 TEAM\AMICUS`
	`(or \AMICUS\AMICUS ATTORNEY SMALL FIRM CLASSIC TEAM\AMICUS`
		`\AMICUS\AMICUS ATTORNEY SMALL FIRM 2016`
		`(or \AMICUS\AMICUS ATTORNEY SMALL FIRM 2014)`
		`(or \AMICUS\AMICUS ATTORNEY SMALL FIRM CLASSIC)`

Small Firm 2014	`\AMICUS\AMICUS ATTORNEY SMALL FIRM 2014 TEAM \AMICUS` `(or \AMICUS\AMICUS ATTORNEY SMALL FIRM CLASSIC TEAM\AMICUS)`	`\AMICUS\AMICUS ATTORNEY SMALL FIRM 2014` `(or \AMICUS\AMICUS ATTORNEY SMALL FIRM CLASSIC)`
Small Firm Classic	`\AMICUS\AMICUS ATTORNEY SMALL FIRM CLASSIC TEAM\AMICUS`	`\AMICUS\AMICUS ATTORNEY SMALL FIRM CLASSIC`
Small Firm 2012	`\AMICUS\AMICUS ATTORNEY 2012 SMALL FIRM TEAM \AMICUS`	`\AMICUS\AMICUS ATTORNEY 2012 SMALL FIRM`
Small Firm 2011	`\AMICUS\AMICUS ATTORNEY 2011 SMALL FIRM TEAM \AMICUS`	`\AMICUS\AMICUS ATTORNEY 2011 SMALL FIRM`
Small Firm 2010	`\AMICUS\AMICUS ATTORNEY 2010 SMALL FIRM TEAM \AMICUS`	`\AMICUS\AMICUS ATTORNEY 2010 SMALL FIRM`
Small Firm 2009	`\AMICUS\AMICUS ATTORNEY 2009 SMALL FIRM TEAM \AMICUS`	`\AMICUS\AMICUS ATTORNEY 2009 SMALL FIRM`
Small Firm 2008	`\AMICUS\AMICUS ATTORNEY 2008 SFE TEAM\AMICUS`	`\AMICUS\AMICUS ATTORNEY 2008 SFE`
Small Firm 5.9	`\AMICUS\AMICUS TEAM SF\AMICUS`	`\AMICUS\AMICUS ATTORNEY SF`
V+ (5.8.1)	`\TEAM50\AMICUS`	`\AMICUS50`

Running the utility

1. We recommend that you back up your Amicus database.
2. If using Client/Server Edition of Amicus, ensure that Amicus Administrator is running (or the Amicus Server program is running as a Service).
3. Ensure that you are logged in and online at the workstation *on the computer where Amicus Administrator is installed*. We recommend that other users NOT be logged in to Amicus, as changes will affect the results.
4. In Windows Explorer at the workstation, double-click **`AmicusAccntChecker.exe`**. Depending on your database size, processing may take a while.

Consistency tests

"Primary Client": For purposes of running several of the consistency checks, the utility attempts to determine a *Primary Client* on each File—that is, the Client Contact exchanged with your accounting system:

- If only one Contact on the File has the Role "Client", that Contact is considered to be the Primary Client.
- If multiple Contacts on the File have the Role "Client", the single one whose Name (First Name and Last Name) exactly matches the Full Client Name field on the File is considered to be the Primary Client.

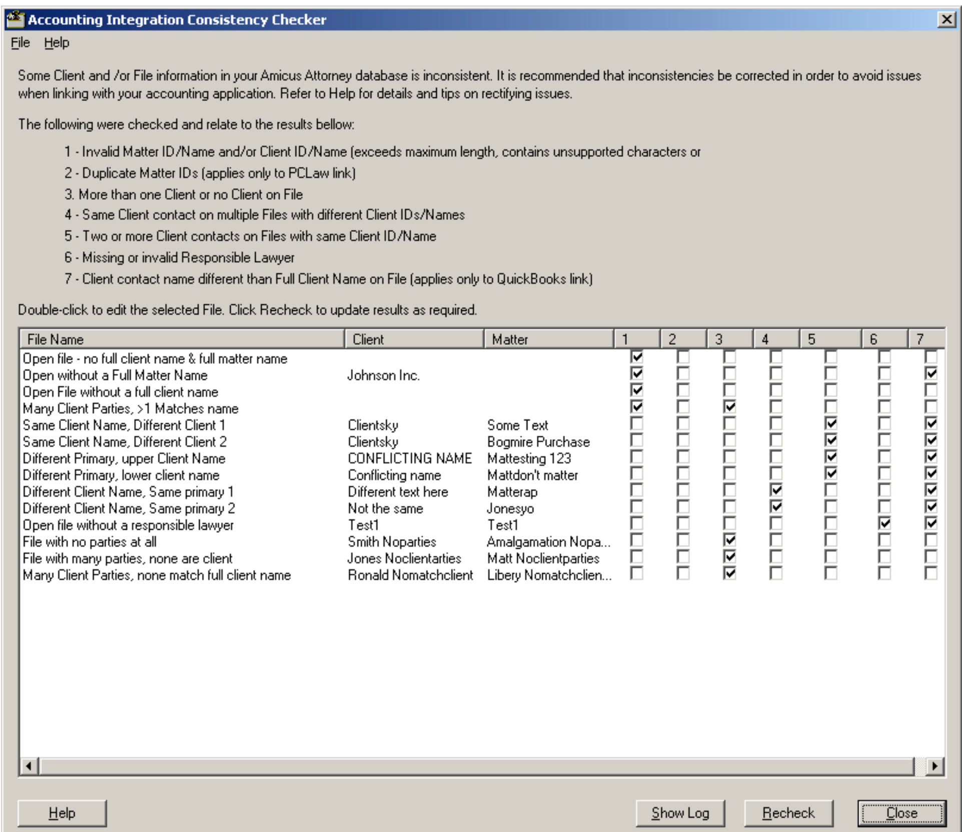
If a Primary Client cannot be determined as described above, the File will fail Test 3 (in which case Tests 4, 5, and 7 will NOT be performed on the File).

Test	Amicus Accounting **	PCLaw	QuickBooks *
1	The File does not have both a Matter ID and a Client ID, or either of these IDs is too long or contains unsupported characters.	The File does not have both a Matter ID and a Client ID, or either of these IDs is too long or contains unsupported characters.	The File does not have both a Matter ID and a Client ID, or either of these IDs is too long. *OR: The File does not have both a Full Matter Name and a Full Client Name, or either of these Names is too long*.
2	The File has a duplicate Client ID and Matter ID—Another eligible File has the same Client ID and Matter ID.	The File has a duplicate Matter ID—Another eligible File has the same Matter ID.	(Not applicable.)
3	A *Primary Client* cannot be determined for the File. That is, there is no "Client" Contact on the File or, it is assigned to multiple "Client" Contacts but none (or more than one) have a Name exactly matching the File's Full Client Name.	A *Primary Client* cannot be determined for the File. That is, there is no "Client" Contact on the File or, it is assigned to multiple "Client" Contacts but none (or more than one) have a Name exactly matching the File's Full Client Name.	A *Primary Client* cannot be determined for the File. That is, there is no "Client" Contact on the File or, it is assigned to multiple "Client" Contacts but none (or more than one) have a Name exactly matching the File's Full Client Name.
4	The File has a conflicting Client ID—The Primary Client on the File has a different Client ID on another eligible File.	The File has a conflicting Client ID—The Primary Client on the File has a different Client ID on another eligible File.	The File has a conflicting Client ID—The Primary Client on the File has a different Client ID on another eligible File. *OR: The File has a conflicting Full Client Name—The Primary Client on the File has a different Full Client Name on another eligible File.*
5	The File has a duplicate Client ID—The Primary Client on the File has the same Client ID as a different Primary Client has on another eligible File.	The File has a duplicate Client ID—The Primary Client on the File has the same Client ID as a different Primary Client has on another eligible File.	The File has a duplicate Client ID—The Primary Client on the File has the same Client ID as a different Primary Client has on another eligible File. *OR: The File has a duplicate Full Client Name—The Primary Client on the File has the same Full Client Name as a different Primary Client has on another eligible File.*
6	The File is not assigned a Responsible Lawyer who is a Timekeeper.	The File is not assigned a Responsible Lawyer who is a Timekeeper.	The File is not assigned a Responsible Lawyer who is a Timekeeper.

Test	Amicus Accounting **	PCLaw	QuickBooks *
7	(Not applicable.)	(Not applicable.)	*The File has different Client Names—The Primary Client on the File has a Name (First Name and Last Name) that does not exactly match the Full Client Name on the File. Or, if the Primary Client has only a Company Name, that name does not exactly match the Full Client Name on the File.)*
** Test 7 and appropriate versions of Tests 1, 4, and 5 (shown in italics) are performed if your Accounting System is set to QuickBooks and the Link is configured to match on Full Matter Name and Full Client Name rather than IDs.*			

Working with the results

The screen lists all eligible Files that failed one or more of the consistency tests.



The following information is shown for each File: Short File Name, Client ID or Name, Matter ID or Name, and checkmarks indicating which of the tests have failed. (For QuickBooks only , depending on Link configuration, the Full Matter Name and Full Client Name are shown instead of IDs.)

To open a File for viewing and/or editing, double-click it in the list. This enables you to correct any deficiencies immediately.

Note that you may view/edit only those Files that you normally have access to in Amicus. If a File does not open, you may use the Whose File Is It search to determine who is assigned—in any File Details window, choose Whose File from the FILES menu, and perform a search on the item's Short File Name.

To sort the list, click the desired column heading. This will assist you in finding Files with similar issues. Note that a long list might take a while to sort.

To view the log of test failures, click Show Log. For each of the tests, the Files that failed that test are listed. If you recheck the database, new results are appended to the bottom of the log: `AmicusAccntChecker.log,` in the \DATABASE folder below the folder where `AmicusAccntChecker.exe` resides at the workstation. The log data is tab delimited—you may import it into Excel for convenient use.

To run the tests again and recheck the database, click Recheck (or run the utility again). We recommend that this be done once you have corrected the deficiencies initially listed.

To exit the utility, click Close.

Tips on correcting inconsistencies

Tests 1, 4, 5 – Duplicate or conflicting IDs/Names

Once an Amicus Small Firm Client has been linked to a Client in your accounting application, the Client IDs cannot be edited in Amicus Files. Also, if using QuickBooks configured to match on Full Names, the Full Client Name cannot be edited in Amicus Files. In order to gain access to these fields, you will first need to temporarily disable the Link by changing your firm's Accounting System configuration setting (e.g. to "Manual Entry"). Team Members will need to exit Amicus and log back in. Remember to re-enable the Link afterward.

CAUTION: Take care in editing IDs/Names as these are the basis on which records are matched in the two applications.

Test 3 – Multiple Clients on a File

For Files that have more than one Client Contact assigned, and none of the Client Contact Names exactly match the Full Client Name on the File, a *Primary Client* cannot be identified. You can either:

- Reclassify the Role of all but one of the Clients on the File. To do this, assign those Clients on the File who are not to be exchanged 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.)
- Confirm that the name of one (and only one) of the Client Contacts exactly matches the Full Client Name field on the Amicus File.
    - Do NOT include the Client Contact's Middle name or initial in the Full Client Name field.
    - If the Client Contact has only a Company name, ensure that it matches the Full Client Name.
    - If the names are different, either update the Amicus Contact record or the corresponding record in your accounting system. If you make a change in your accounting system, you will then need to perform an exchange to update the Full Client Name field.

To gain access to Files with no Team Members assigned

If no Team Members are assigned to a File, it cannot be opened for viewing or editing. Such orphaned Files should probably be deleted or Excluded. To gain access to such Files, use the Create Archive function to automatically assign them to the Team Member who is User 1. In Amicus Administrator, choose Database > Management > Archive. The Create Archive window appears. Click Cancel. (To determine which Team Member is User 1, choose Users > User Management > Transfer License and examine the Licensed Users list.)

Excluding Files from exchange with Amicus Accounting or PCLaw

Files that are not to be exchanged should be marked Closed or Excluded.

NOTE: Excluding a File from exchange with PCLaw removes its Client and Matter IDs. We recommend that you also make the corresponding change to the PCLaw Matter—that is, either Close the Matter or select the “Disable Updates with Other Software” option.

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