Amicus Link Guide: Timeslips

Applies to: Amicus Attorney

Synchronize your Amicus and Timeslips matter files/clients, and dynamically exchange your Amicus time entries and expenses to Timeslips.

About the Link

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

You can exchange Amicus File information with Timeslips® Client information, and optionally keep the Amicus Primary Client's Address and Communications in synchronization with the Timeslips Client. You can map Amicus Timekeepers to Timeslips Timekeepers, and Amicus Activity Codes to Timeslips Activities, and Amicus Rates to Timeslips Rates. A Link Wizard easily guides you through configuration of the exchange options. The link ensures that posted Time and Expense entries go directly to Timeslips without the need for a separate exchange process.

Once the Link has been initialized, you have the choice of exchanging Amicus Files individually or performing a global exchange of all Files. Upon creating New Files in Amicus, you will be given the option of creating an equivalent Timeslips Client.

The first and second part of this *Guide* is primarily written for Amicus Administrators, describing how to set up and maintain the Link. Amicus Firm Members should see "Using the Link" on page 23 for details on daily use of the link functions.

What you need

The Amicus Attorney-Timeslips Link requires:

- Installed on the Amicus Attorney Application Server:
  – Amicus Attorney Server
  – Timeslips (configured to use Client.Projects)*
- Installed on the workstations of users who wish to use the Link:
  – Amicus Attorney Workstation

For a list of supported Timeslips versions, see the *Amicus Attorney Software & Hardware Requirements*, available from the [Technical Resource Guides/Updates](#) section of our website.

* IMPORTANT: If using References rather than Client.Projects for clients in Timeslips, you will need to first convert your Timeslips configuration to Client.Projects in order to use the dynamic Link with Amicus. (Contact your Timeslips Consultant for further information.) Alternatively, continue to use your current configuration—you will not be able to use the dynamic Link with Amicus, but can instead export Amicus Time Entries via a Custom Accounting Profile and then import them into Timeslips. (See the "Customizing the Database > Creating a custom Time Entry export format" topic in the Administrator Help.)

IMPORTANT: For the Timeslips 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.

Upgrading from Amicus Small Firm

If you are upgrading from Amicus Small Firm, you should be aware that:

- The Amicus File / Timeslips Client match criteria is now based on a new Amicus Nickname 1 field. During initialization, a Nickname 1 field will be populated in Amicus Files wherever possible. For more information, see "File/Client record match criteria" on page 7.

- The way in which Amicus Contact records are created and updated has been redesigned. Communications information is exchanged in both directions between an Amicus File and a Timeslips Client. However, when an Amicus File is created by the Link (based on a Timeslips Client), an Amicus Contact record is not automatically created, nor is any existing Contact record automatically linked to the File. On an optional, File-by-File basis, you can create an Amicus Contact record based on the Timeslips information in the File. The Contact record is linked to the Amicus File and, via this File, the communications information in both the Contact and Timeslips Client is kept synchronized.

What information is exchanged

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

Amicus record type	Exchange direction	Timeslips record type
Files / Primary Clients*	◄——————►	Clients
Time Entries	——————►	Time Slips
Expenses	——————►	Expense Slips

* The Timeslips Client's Name, Address, and Communication details are accessible from the Amicus File's Billing Info view. You can optionally choose to have the Primary Client's Address and Communication details kept synchronized with the Timeslips Client details on the File. This option is set on a per-File basis in Amicus Attorney.

Scope

In some instances the above noted records are filtered based on certain criteria such as their status (only non-Closed and non-Inactive items are exchanged). The following rules apply.

General Rule:
- Record Deletions are not supported in the Link and therefore must be performed manually in both applications.

Files/Clients:
- Only Amicus Open Files that have not been set to be Excluded from the Link, and that have an associated Primary Client, will be exchanged.
- Only Timeslips Open Clients will be exchanged.
- Updates will not be sent over from Amicus Attorney where the Amicus File is Open but the Timeslips Client is Inactive or Closed. Therefore, changes must be manually input.

Activity Codes/Activities:
- Only Timeslips Open Activities are available for mapping in the Timeslips Link Configuration wizard in Amicus Attorney.

Time Entries:
- Time Entries are sent to Timeslips from Amicus Attorney directly by Firm Members by using the Posting function.

- Updates to Time Entries already posted to Timeslips are not supported. Revisions must be made directly in Timeslips.

Expense Entries:

- Expense Entries are sent to Timeslips from Amicus Attorney directly by Firm Members by using the Posting function in the Amicus File's > Facts > Time Spent > My Expenses view.

Mappings

The following *common list items* must be mapped through the Timeslips Link Configuration wizard in Amicus Attorney. Mapping facilitates differences in naming convention between the two applications.

It is important to map new common list items as they are added in either application. For more information, see "Maintaining the Link" on page 21.

Amicus items	Timeslips items
Firm Members who are Timekeepers	Timekeepers
Billing Rate Labels	Timekeeper Rate Labels
Activity Codes	Activities *
Expense Codes	Expenses **
Task-Based Billing Sets (optional)	Template Clients
Task-Based Billing Tasks (optional)	References
Task-Based Billing Activities (optional)	Activities
* In Timeslips, you may have Time Activities mapped to a term other than "Activities" (e.g. "Tasks").	
** In Timeslips, you may have Expense Activities mapped to a term other than "Expenses".	

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 data in the two applications will be exchanged and matched.

2   Install Timeslips on the Amicus Attorney Application Server.

  - Ensure that any Timeslips service/maintenance releases are applied if applicable.

  - Configure Timeslips to use the Timeslips database you want Amicus Attorney to link with. If you do not have an existing Timeslips database, create one.

  - If you wish to take advantage of Task-Based Billing, you should enable the References Feature in Timeslips, set up Timeslips Template Clients, and assign them References. Consult the Timeslips documentation for details.

  - If you have enabled the Timeslips Security feature, you should permit Guests to Login without passwords, as a User with sufficient rights—for more information, see "Timeslips Security" on page 12.

3   Prepare your data where necessary in both applications as detailed in this *Guide*.

4   In Amicus Attorney Firm Settings, set your Accounting System to Timeslips and run the Link Configuration wizard. Complete Steps 1 to 4 of the wizard.

5   Back up both the Timeslips database and the Amicus database.

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 Timeslips. If desired, however, you may configure your system to eliminate that necessity. For details, see "Configuring your system to handle Server restarts" on page 22.

Amicus Attorney and Timeslips will now be ready to allow users to perform exchanges and post Time Entries and Expenses.

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

Initialization and exchange details

The Link exchanges Amicus File (and optionally, Primary Client) information with Timeslips Client information. The following sections describe **how records are matched** and **how fields are mapped** in order to facilitate the proper supply of information to records that are updated or created in the other application.

For a complete list of field mappings, see "Preparing your data" on page 12.

Important Concepts

As mentioned earlier, Timeslips Clients are equivalent to Amicus Files.

Initialization/exchange will create new Files in Amicus Attorney when a Timeslips Client does not have an equivalent File in Amicus Attorney (based on Nickname 1). The Timeslips Client's Name, Address and Communication details will be shown in the Billing Info view of the Amicus Attorney File.

Because Timeslips does not maintain a separate Client and Matter record, a direct link is not created between the Timeslips Client and the Primary Client on the Amicus File. In order to ensure data integrity for Clients who have multiple Matters, a link is established between the Timeslips Client and the Amicus File, and optionally between the fields in the Amicus File containing the Timeslips Client data. This allows you to control the flow of data and avoid duplicate Client records in Amicus.

The Accounting Link Details and Billing Info views of each File provide you with the ability to:

- create a Contact record based on the Timeslips Client Info in the Amicus File
- choose to update the File's Primary Client Address and Communication details with changes from Timeslips and vice versa

Exchange methods

There are two exchange methods:

- **Individual File exchange**—involves a **single** Amicus File (and optionally its Primary Client Contact record) with the corresponding Timeslips Client. Individual File exchange is performed from the Accounting Link Details view of the File Detail in Amicus.
- **Global exchange**—involves additions or modifications since the last exchange, in either database, involving any eligible Amicus Files and Primary Clients, or any eligible Timeslips Clients. Global exchange is performed from the Office menu in Amicus.

Exchange direction priority

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 each of initialization and subsequent exchanges.

Match Criteria

Eligible records that meet the scope requirements (see "What information is exchanged" 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 applications.

- **If a match is found**, either the Amicus record or the Timeslips 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 as noted above.

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

File/Client record match criteria

A Client in Timeslips is linked with an Amicus File.

Key Identifiers

Each Timeslips Client has a unique Nickname 1 that identifies the Client. In Amicus, each File has a Nickname 1 that can be assigned from the Accounting Link Details view of the File.

The Link matches Timeslips Clients with Amicus Files based on the Nickname 1 fields.

Upgrading from Amicus Small FIrm

In Amicus Small Firm, the key identifier for Files/Clients was the Amicus Client ID and, optionally, the Matter ID. During initialization, the new Link will find any blank Nickname 1 fields in Amicus Files that are eligible for exchange and populate them with the File's Client ID and, optionally, Matter ID. The Timeslips Client Project Naming System settings determine whether both IDs are used and, if so, what separator to use between them.

NOTE: The maximum length of the Nickname 1 field is 30 characters (provided that you have set that field to its maximum length in your Timeslips setup). Link initialization will fail any Files for which the Client ID (plus, optionally, Matter ID and separator) is too long.

File/Client field mapping

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

Amicus File field	Timeslips Client field
Nickname 1	Nickname 1
Full Client Name *	Client Name
Full Matter Name	In Reference To
Short File Name *	Nickname 1
Client Info: Client Name	Client Name
Client Info: Street Address 1st Line	Address 1st Line
Client Info: Street Address 2nd Line	Address 2nd Line
Client Info: Street Address 3rd Line	Address 3rd Line
Client Info: City	City
Client Info: State	State
Client Info: ZIP	ZIP
Client Info: Phone	Phone 1, 2, 3, or 4 **
Client Info: Fax	Phone 1, 2, 3, or 4 **

Amicus File field	Timeslips Client field
Client Info: E-mail	Phone 1, 2, 3, or 4 **
Client Info: Web	Phone 1, 2, 3, or 4 **

* These fields are set only when a new File is created in Amicus during an exchange with Timeslips. The fields are not updated in later exchanges.

** The Link Configuration wizard enables you to map Timeslips Phone Fields to Amicus Communication types.

Responsible Lawyer assignments

Timeslips does not have a standard (native) field for the assignment of a Responsible Lawyer. For this reason, the Link Configuration wizard requires you to indicate which Amicus Timekeeper should be set as the Responsible Lawyer on all **new** Files created during initialization or exchange.

Firm Member assignments to Amicus Files

If a new Amicus File is created from a Timeslips Client, the default Responsible Lawyer (as indicated in the Link Configuration wizard) is assigned to the File. In addition, the Firm Members who are specified in that Responsible Lawyer's Amicus Attorney 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 Timeslips Client (during initialization or exchange), the Amicus Short File Name is the Timeslips Nickname 1. You are free to modify the Amicus Short File Name if you wish.

Primary Client mapping

As mentioned earlier, each Amicus File contains the Timeslips Client Address and Communication details. This information is exchanged between Timeslips and Amicus Attorney bi-directionally. In other words, when the Address or Communication details are modified in Timeslips and an exchange is performed, the Amicus File will be updated to reflect the change.

In addition, each File provides you with the ability to indicate whether the Primary Client on the File should be kept in synchronization with this information. Files that have this option enabled will result in the following behavior:

- When a modified Timeslips Client is exchanged, the File's Client Info fields will be updated with the Timeslips data. In turn, if the File has the Update Primary Client option enabled, the Primary Client will be updated using the mapping below.

- When a Contact record is modified in Amicus, any Files that designate this Contact as the Primary Client and have the Update Primary Client option enabled, will be updated. In turn, when an exchange is performed, the equivalent Timeslips Client will be updated.

- When you modify the Client Info fields in an Amicus File that has the Update Primary Client option enabled, the Contact record that is Primary Client will be updated. In turn, when an exchange is performed, the equivalent Timeslips Client will be updated.

Amicus Primary Client field	Timeslips Client field
Primary Address 1st Line	Address Line 1
Primary Address 2nd Line	Address Line 2
Primary Address 3rd Line	Address Line 3
Primary City	City
Primary State	State
Primary ZIP	ZIP
Primary Phone	Phone 1, 2, 3, or 4
Primary Fax	Phone 1, 2, 3, or 4
Primary E-mail	Phone 1, 2, 3, or 4
Primary Web	Phone 1, 2, 3, or 4

Phone format

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

To ensure the proper parsing of Phone numbers, use any the following formats when entering Phone information in Timeslips:

> **+***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 "x" must precede an Extension.

About Billing Rate Labels and Timekeeper Rate Labels

Amicus Billing Rate Labels are mapped to Timeslips Timekeeper Rate Labels as part of the Link Configuration wizard. This rate mapping is used when Time Entries are posted from Amicus to inform Timeslips which Timekeeper Rate should be used on the Time Slip Entry.

The Link Configuration wizard provides two options for you to specify how Rates on Time Entries should be set. See "Step 3c - Rate Management" on page 17.

About Activity Codes and Activities

Amicus Activity Codes are mapped to Timeslips Time Activities as part of the Link Configuration wizard. This mapping is used when posting Time Entries from Amicus to inform Timeslips which Activity should be assigned to the Time Slip Entry.

About Task-Based Billing Sets and Template Clients

The Amicus Attorney-Timeslips Link supports Task-Based Billing, in which Firm Members identify the work they do based on a separate, defined set of special or industry standard tasks and activities. This feature is enabled/disabled as part of the Link Configuration wizard. By default, support for Task-Based Billing is disabled. The Link Configuration wizard will detect if your Timeslips has the optional References Feature enabled in your Timeslips database, and if so, will display a dialog in which you can enable support for Task-Based Billing. (If Task Based Billing is introduced later, after the Link has been in use for some time, simply enable References and the dialog will become available—re-initialization of the Link will not be required.)

Amicus Attorney and Timeslips have different implementations of Task-Based Billing. The Link attempts to reconcile these differences by using the following approach.

Timeslips has two types of References: Client-specific References and Template Client References (sometimes called "Global References"). Client-specific References are References assigned to a particular Client record rather than a Template Client. Each Timeslips Client can be configured to use Template Client References from the Client References dialog by specifying a Template Client as the source of the References. **The Link supports only Template Client References**.

The Link Configuration wizard will prompt you to map each of the Amicus Task-Based Billing Sets to a Timeslips Template Client (one that is not marked for deletion). Once you have done that, you will then have to map each of the individual Amicus Task-Based Billing Tasks belonging to a Task-Based Billing Set to the Timeslips References that belong to the equivalent Timeslips Template Client.

For example, assume that you have a Task-Based Billing Set in Amicus called *Litigation Code Set*. The *Litigation Code Set* contains five Tasks. You have a Timeslips Template Client called *Litigation References*, which has several References assigned to it. In the Link Configuration wizard, you map the Amicus *Litigation Code Set* to the Timeslips Template Client *Litigation References*. You will then be able to map the individual Tasks that belong to the Amicus *Litigation Code Set* to the References that belong to the Timeslips *Litigation References* Template Client.

About Time Entries

Time Entries in Amicus Attorney are exchanged with Timeslips in one direction—from Amicus to Timeslips. Time Entries are sent to Timeslips 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.

Billing Categories—When you select Timeslips as your accounting system, three new Billing Categories are automatically added in Amicus: "Hold – Billable", "Do Not Bill", and "No Charge".

On posting an Amicus Time Entry, its information will be sent to Timeslips where an equivalent Time Slip will be created. The following table shows what information is exchanged to Timeslips, depending on the Billing Category and Billing Rate assigned in the Amicus Time Entry.

Amicus		Timeslips			
Billing Category	Billing Rate	Time Spent	Rate [3]	Rate Type	Billing Status
Fixed Fee	File Fee or Flat Rate	0	Fee Amount	Flat	Billable
Fixed Fee	Normal, etc.	Duration	Value of mapped Billing Rate	Hourly	No Charge
Fixed Fee	Other	Duration	Rate Value	Hourly	No Charge

Amicus		Timeslips			
Billing Category	Billing Rate	Time Spent	Rate [3]	Rate Type	Billing Status
Contingency	File Fee or Flat Rate	0	Fee Amount	Flat	Billable
Contingency	Normal, etc.	Duration	Value of mapped Billing Rate	Hourly	No Charge
Contingency	Other	Duration	Rate Value	Hourly	No Charge
Billable [1]	Flat Rate	0	Fee Amount	Flat	Billable
Billable [1]	Non-Billable	Duration	0	Hourly	No Charge
Billable [1]	Normal, etc.	Duration	Value of mapped Billing Rate	Hourly	Billable
Billable [1]	Other	Duration	Rate Value	Hourly	Billable
Hold - Billable	Flat Rate	0	Fee Amount	Flat	Hold - Billable
Hold - Billable	Non-Billable	Duration	0	Hourly	Hold - Billable
Hold - Billable	Normal, etc.	Duration	Value of mapped Billing Rate	Hourly	Hold - Billable
Hold - Billable	Other	Duration	Rate Value	Hourly	Hold - Billable
Non-Billable [2]	Normal, etc.	Duration	Value of mapped Billing Rate	Hourly	No Charge
Non-Billable [2]	Other	Duration	Rate Value	Hourly	No Charge
No Charge	Flat Rate	0	Fee Amount	Flat	No Charge
No Charge	Non-Billable	Duration	0	Hourly	No Charge
No Charge	Normal, etc.	Duration	Value of mapped Billing Rate	Hourly	No Charge
No Charge	Other	Duration	Rate Value	Hourly	No Charge
Do Not Bill	Normal, etc.	Duration	Value of mapped Billing Rate	Hourly	Do Not Bill
Do Not Bill	Other	Duration	Rate Value	Hourly	Do Not Bill

[1] Billable = Billing Categories assigned the "Billable" attribute, excluding Fixed Fee and Contingency.
[2] Non-Billable = Billing Categories not assigned the "Billable" attribute, including Vacation and Personal.
[3] You can configure the Link to use Timeslips Rate Rules in place of the Timeslips Billing Rates mapped from Amicus Billing Rates.

About Expense Entries

Expense Entries are transferred in one direction, from Amicus to Timeslips. Expense Entries are created and posted from the File's Time > My Expenses view or All Expenses view.

The Amicus Expense Details dialog permits you to assign an Expense Code, specify a Quantity, and specify a Price. On posting, this information is sent to Timeslips where an equivalent Expense Slip will be created.

Preparing your data

We recommend that the firm's Timeslips/Amicus expert, with the assistance of the Amicus Administrator and Timeslips Administrator, prepare the firm's data before Link configuration and initialization.

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, consider 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 Attorney	Timeslips	Add to Amicus via the wizard	Add to Timeslips via the wizard
Timekeepers	Timekeepers	No	No
Billing Rate Labels	Timekeeper Rate Labels	No	No
Activity Codes	Activities	YES	YES
Expense Codes	Expenses	YES	YES
Task-Based Billing Sets	Template Clients	No	No
Task-Based Billing Tasks	References for the Template Clients	YES	YES
Task-Based Billing Activities	Activities	YES	YES

Preparing Timeslips data

Confirm that Timeslips Clients that you do **not** wish to transfer to Amicus are set as Inactive or Closed.

Timeslips Security

If you have enabled Security in Timeslips, then you must complete the following steps to ensure that Amicus Attorney can successfully integrate with Timeslips.

1 In Timeslips, select Setup > Security > Global. In the "Guests log in without a password using" section, choose a Timeslips Timekeeper that you wish Amicus Attorney to log in as. The user you select here must be granted sufficient rights to allow Amicus Attorney to add and modify records in Timeslips.

2 Verify that the Timekeeper you have chosen above has been granted sufficient rights. From the Timeslips menu, select Setup > Security > Timekeeper Rights. Select the Timekeeper and click Open. This Timekeeper must be granted at least the rights that are listed in the following table.

Access Rights Area	Rights
Slip	New, Edit Time Spent on New Slip
Client	New, Edit
Activity	New
Expense	New

Access Rights Area	Rights
Reference	New
Other	Database Access, Connected Databases

Preparing Amicus data

- Confirm that every File eligible for exchange has been assigned a unique Nickname 1 in the File's Accounting Link Details view.
- Confirm that every Amicus File eligible for exchange has a Primary Client.
- Ensure that the default Responsible Lawyer specified in the Link has configured their Files preference that specifies the list of Firm Members that will be automatically assigned to new Files.

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 Timeslips or all in Amicus, then complete the following step:

- Initialization and subsequent exchanges will transfer only Amicus Open Billable Files (and optionally, Non-Billable Files) that are not flagged as Excluded, and only Timeslips Open Clients. Ensure that these are set properly.

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

- For initialization purposes, decide which side should take priority in the exchange of Files/Clients (set as part of the Link Configuration wizard).
- Check that corresponding Amicus Files have a Client ID (and perhaps a Matter ID) so that initialization can generate a Nickname 1. (This is primarily to assist firms upgrading from an earlier version of Amicus Attorney, or switching from a different accounting system.)

It may 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 24.

You are now ready to proceed to configuring the Link.

Configuring the Link

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

1. Perform the configuration directly on the Server where your Amicus Attorney Application resides.

2. Ensure that Timeslips is currently installed and running properly on the Amicus Attorney Application Server.

3. If applicable, ensure that you have followed the instructions regarding Timeslips Security.

4. 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 Firm Settings dialog appears.
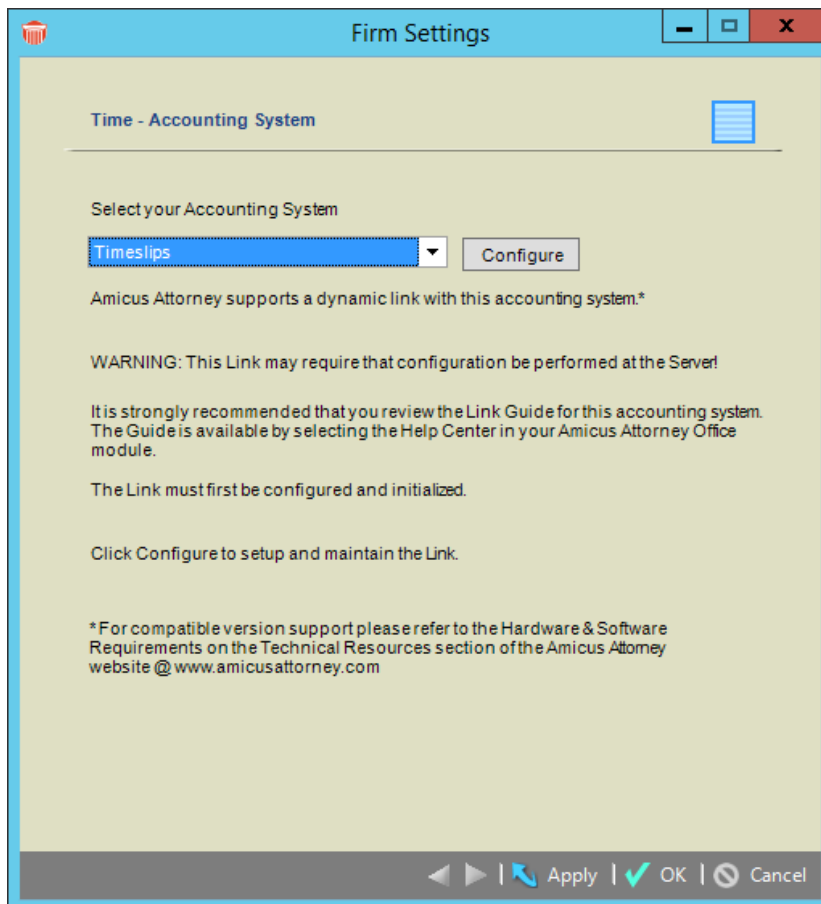
5. Select "Timeslips" as your accounting system from the drop down list.

6. 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

The Welcome dialog of the wizard displays the current completion status of each step in the configuration. Each step has a series of dialogs.
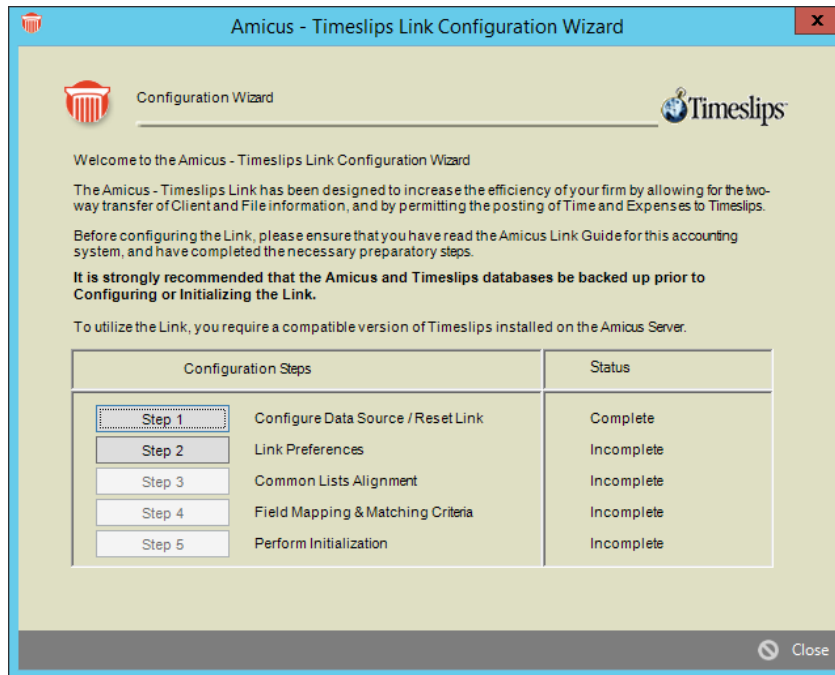
Complete the configuration steps as described in the following sections. The completion status of each step is shown at the right.

Step 1 - Set the Timeslips Database for the Link

Click Step 1 in the Welcome dialog of the Link Configuration wizard. The Timeslips Database Path dialog appears.

- If using Timeslips (perpetual license), click Browse and select the path to your Timeslips Database. You should select the MAIN.DB file from the folder containing your Timeslips database files. For optimal performance, the Timeslips database should be on the Amicus Attorney Application Server.

- If using Timeslips (subscription license), select your Timeslips SQL Database from the drop-down list.

Then click Finish. The Welcome dialog reappears.

Changing to a different Timeslips Database

IMPORTANT: If you specify a different Timeslips Database after you have performed an initialization, you will need to reset, reconfigure, and re-initialize the Link before using it again. Re-initialization may be a lengthy process.

1   Click Browse and select the path to the new Timeslips Database.

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

3   After resetting the Link, you will need to repeat Steps 2 to 5 in the wizard.

4   Initialize the Link again in order to resume sharing data with Timeslips.

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 Timeslips takes priority during initialization. Choose the application in which the data is most accurate. Then click Next.

Step 2b - Client Nickname 2

Specify whether the Link should assign Nickname 1 or the next available Nickname 2 (using Timeslips autonumbering) to the Nickname 2 field in new Timeslips Clients. For more information, see "File/Client record match criteria" on page 7.

Then click Next.

NOTE: Nickname 1 and Nickname 2 can each be up to 30 characters long.

Step 2c - File exchange

Specify whether initialization and exchanges should include Amicus Files that are Non-Billable (and Open), rather than only ones that are Billable (and Open).

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 Timeslips takes priority in exchanges. Then click Next.

Step 2d - References as Task-Based Billing Tasks

NOTE: This dialog appears only if References have been enabled in Timeslips.

Specify whether to enable Task-Based Billing in Amicus Attorney. This will enable you to assign Task Codes (from a particular Task-Based Billing Code Set) to Amicus Time Entries, and map the Amicus Task-Based Billing Code Sets to Timeslips References that are global because they are associated with Template Clients.

For more information, see "About Task-Based Billing Sets and Template Clients" on page 10.

Then click Next.

Step 2e – Default Responsible Lawyer

During initialization and exchange, the Link will likely need to create new Files in Amicus. These new Files need to be assigned a Responsible Lawyer and can optionally be assigned to other Firm Members.

Select a Firm Member (Timekeeper) that you want assigned as the Responsible Lawyer for new Files created during initialization or exchange.

You may also choose to apply this Firm Member's default list of Firm Members on New Files, specified in their Preference. If you do not choose this option, the File will be assigned to only the selected default Responsible Lawyer, and you can manually assign the File to other Firm Members later.

Then click Finish. The Welcome dialog reappears.

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 Attorney and Timeslips.

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

Step 3a - Map Timeslips Timekeepers with Amicus Timekeepers

After an informational dialog, the Map Timekeepers dialog appears.

Map the Timeslips Timekeepers to Amicus Timekeepers, for Time Entry and Expense posting. All Amicus Timekeepers must be mapped. You can have more Timekeepers in Timeslips than in Amicus. A Timeslips Timekeeper can be mapped to only one Amicus Timekeeper, but several Amicus Timekeepers can be mapped to one Timeslips Timekeeper.

Then click Next.

Step 3b - Map Timeslips Timekeeper Rate Labels with Amicus Billing Rate Labels

Map the Timeslips Timekeeper Rate Labels to Amicus Billing Rate Labels. All Amicus Billing Rate Labels must be mapped to Timeslips Timekeeper Rate Labels. This mapping will be used when posting Time Entries from Amicus to Timeslips.

Then click Next.

Step 3c - Rate Management

Specify which of the following approaches should be taken in applying Rate Values when Time Entries are posted from Amicus to Timeslips:

- **Use Timeslips Rate rules**—Allow Timeslips to determine the appropriate Rate for each Time Entry posted from Amicus Attorney, based on the Timeslips Client's Rate settings and Automatic Rate Selection Rules if applicable. This may cause the value of the Time Entries to be different in Amicus than in Timeslips.

  Example: The Amicus Timekeeper *Mark* creates a Time Entry for the Client *John Smith* in Amicus using his Normal Rate of $80 per hour. The Amicus Normal Rate is mapped to the Timeslips Timekeeper Rate 3, which has a value of $75. This Time Entry is posted from Amicus Attorney. In

Timeslips, the Client *John Smith* has been configured to use Rate 1 from the Client Rate Table, which has been set to $40 per hour. As a result, the Amicus Time Entry will have a rate of $80, while the Timeslips Time Slip will have a Rate of $40.

- **Use mapped Rates and ignore Timeslips Rate rules**—The Billing Rate selected in the Amicus Time Entry will be applied in Timeslips, according to the mapping set in the preceding Map Timeslips Timekeeper Rates With Amicus Billing Rates dialog. If the Rate values differ in the two applications, then the value of the Time Entries will differ. We therefore recommend that you first align the Rate values in the two applications.

  Example: If rates are set as described in the preceding example, the Amicus Time Entry will have a rate of $80, while the Timeslips Time Slip will have a Rate of $75.

Then click Next.

Step 3d - Map Activities/Nicknames

Select the Timeslips Activity Nickname fields that map to the Name and Code of Amicus Activity Codes.

This setting will be used when you Add a new Activity/Task from either application to the other. Amicus Activity Codes, Task-Based Billing Tasks, and Task-Based Billing Activities have two components: a Name and a Code. Similarly, Timeslips Activities and References have a Nickname 1 and a Nickname 2.

This mapping informs the Link how to properly add new Activities/Tasks in either application.

Then click Next.

Step 3e - Map Timeslips Activities with Amicus Activity Codes

Map the Timeslips Activities to Amicus Activity Codes. Add new Timeslips Activities 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.) **All Amicus Activities must be mapped to Timeslips Activities.** This is to ensure that Amicus Time Entries are properly posted to Timeslips.

Then click Next.

Step 3f - Map Timeslips Expenses with Amicus Expense Codes

Map the Timeslips Expenses to Amicus Expense Codes. Add new Timeslips Expenses 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.) **All Amicus Expenses must be mapped.** This is to ensure that Amicus Expense Entries can be properly posted to Timeslips. Then click Next.

Step 3g - Map Timeslips Template Clients with Amicus Task-Based Billing Code Sets

NOTE: This dialog appears only if you enabled support for Task-Based Billing in Step 2 of the Link Configuration wizard.

Map the Timeslips Template Clients to Amicus Task-Based Billing Code Sets. Only map the Template Clients that have References equivalent to the Amicus Tasks belonging to the relevant Amicus Task-Based Billing Code Set. (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 3h - Map Timeslips References with Amicus Task-Based Billing Task Codes

NOTE: This dialog appears only if you enabled support for Task-Based Billing in Step 2 of the Link Configuration wizard.

For each Amicus Task-Based Billing Code Set, map the Timeslips References to Amicus Task-Based Billing Task Codes. Add new Timeslips References 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.)

Then click Next.

Step 3i - Map Timeslips Activities with Amicus Task-Based Billing Activity Codes

NOTE: This dialog appears only if you enabled support for Task-Based Billing in Step 2 of the Link Configuration wizard.

Map the Timeslips Activities to Amicus Task-Based Billing Activity Codes. Add new Timeslips Activities or Amicus Task-Based Activity Task 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.) All Amicus Activity Codes must be mapped to Timeslips Activities.

Then click Finish. The Welcome dialog reappears.

Step 4 - Review the field mapping and matching criteria

Click Step 4 in the Welcome dialog of the Link Configuration wizard. In this step, you review and set mappings for the Link.

Step 4a - Field Mapping information

Read this description and then click Next.

Step 4b - Map Timeslips Phone fields and Amicus Communications fields

Select the Timeslips Phone fields that map to the Amicus Communications fields.

Then click Next.

Some informational dialogs are then provided as a quick reference on how:

- File/Client fields match criteria and exchange scope
- Nickname 1 field will be used for matching during initialization (dialog shown only if you used the Amicus Attorney-Timeslips Link in an earlier version of Amicus Attorney)

Click Finish when you reach the last of these dialogs.

Initializing the Link

You are now ready to exchange information between Amicus Attorney and Timeslips.

An Amicus Administrator performs the initialization (i.e. the first exchange).

1   **IMPORTANT**: Back up both the Timeslips 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 Amicus Attorney.

4   To start initialization, first click Step 5 in the Welcome dialog of the Link Configuration wizard.

    Select each of the checkboxes when you complete the corresponding step.

    Then click Begin Initialization in the Initialization dialog.

5   The Link does a Pre-initialization Check to ensure that initialization will produce good 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 `AmicusTimeslips.log` and is located in the folder accessed by choosing Amicus > Amicus Attorney Tools > Server Logs from the Windows Start menu

        The following issues are checked for in Amicus Attorney:
        - Files that are Open Billable (and Non-Billable if applicable) for which a Nickname 1 could not be generated
        - two or more Files with the same Nickname 1

    - If the Link passes the Pre-initialization Check, initialization starts automatically.

6   The Link performs the following tasks:

    - populates any blank Nickname 1 fields in Files that are eligible for exchange
    - synchronizes Amicus Files with Timeslips Clients
    - creates a Timeslips Activity of "No Activity" (if one does not already exist)

7   If initialization fails, review the error log, resolve all issues, and repeat the initialization process.

Maintaining the Link

The Common Lists

The Amicus Administrator and Timeslips Administrator must maintain the Common Lists of Amicus Timekeepers/Timeslips Timekeepers, Amicus Billing Rates/Timeslips User Rates, and so on. For a table of these lists, see "Preparing your data" on page 12.

For example, if you add an Activity Code in Amicus Attorney, you must map it to a Timeslips Activity via the Link Configuration wizard. The posting of unmapped Time Entries will fail. Note that for some 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 in both applications.

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 Timeslips, you first unmap them using Step 3 of the Link Configuration wizard.

Resetting the Link

The Amicus Administrator can reset the Link if necessary. This unlinks all Files/Clients.

IMPORTANT: We highly recommend that you reset the Link only with the assistance of [Amicus Technical Support](#) at 800-472-2289 or 416-977-6633. (at 1-800-472-2289). The Link should be reset only under the following conditions:

- after recovering your Amicus database or Timeslips database, or
- after restoring a backup in Amicus Attorney or Timeslips

To reset the Link, perform the following steps:

IMPORTANT: Back up the Timeslips database and the Amicus database before resetting the Link.

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

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

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

4 Click Configure to run the Link Configuration wizard.

5 Click Step 1 in the Welcome dialog of the Link Configuration wizard. The Timeslips Database Path dialog appears.

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

7 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 Timeslips.

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 may communicate with Timeslips. If desired, however, you may configure your system to eliminate that necessity, as detailed below, **after you have configured the Link**.

Limitations of this configuration

- The install path for Timeslips on the Server (and for Timeslips on all the Workstations) must be a UNC path, not a mapped drive.
- The path to the Timeslips database in Step 1 of the Link Configuration must be set a local path, not a mapped drive. (Not relevant if using Timeslips.)
- If the administrator's Windows User Name or Password change, the Service and component must be reconfigured accordingly.
- If Timeslips 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 Timeslips (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 Timeslips.

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 TimeSlipsApiLink 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 TimeSlipsApiLink 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.

Using the Link

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

- Adding a File in Amicus Attorney and sending it to Timeslips.
- Using the Accounting Link Details view of a File in Amicus Attorney to exclude the File from exchanges or unlink the File from a Timeslips Client.
- Using the Billing Info view of a File in Amicus Attorney change the Timeslips Client address and communications information.
- Performing 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 Expense Entries from Amicus Attorney.

Adding a File in Amicus Attorney

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

When you add a new File in Amicus Attorney, you must specify a Primary Client in order for the File to be transferred to Timeslips as a Client.

From the Admin > General view of the Amicus File:

- To identify the Primary Client, click the Select People button under the Primary Client heading, select a Contact in the dialog that appears (or create a new Contact if required), and click OK. The Client ID field is automatically filled in if the Contact has already been assigned a Client ID; otherwise, the field is left editable.

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

  - Enter a unique Short File Name.

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

Saving the new File

When you save the new File, a dialog appears.

- If you select the **Exchange This File Now** option, specify the Client Nickname 1 (required for matching) and, optionally, the Client Nickname 2. If the Nickname 2 field is left empty, then depending on the Link settings chosen by the Amicus Administrator in the Link Configuration wizard, the Timeslips Client's Nickname 2 either will be assigned a value by Timeslips, or will be assigned the first 15 characters of the Nickname 1.

  If you want to maintain synchronization of the Primary Client address and communication information between the Primary Client Contact record and the Accounting Link Details view of the File, then select the On Exchange checkbox as well. Then click OK.

If all required fields are present, the File will be saved and sent to Timeslips.

- If you select the **Exclude This File From Accounting Link** option and click OK, the File will be saved. The Exclude This File checkbox is automatically selected (in the Accounting Link Details view). Later, you can clear the Exclude checkbox and then proceed to exchange the File with Timeslips if you have assigned the File a Nickname 1.

Using the Accounting Link Details view

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

To see the Accounting 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 Timeslips Client, the link with the corresponding Timeslips Client is maintained, but the File is excluded from any future exchanges.

We recommend that you also exclude the corresponding Timeslips Client from exchange by making it Inactive or Closed.

To make the File eligible for exchange, clear the Exclude This File checkbox. If the File is not already linked to a Timeslips Client, specify Client Nickname 1, and select or clear the On Exchange Also Update The Primary Client checkbox as appropriate. If the File is already linked to a Timeslips Client, be sure that the Timeslips Client is not excluded from exchanges (by making it Active). 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 Nickname 1.

Unlinking an Amicus File from a Timeslips Client

To unlink an Amicus File from a Timeslips Client, 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 Timeslips Client.

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 File, and exclude the corresponding Client in Timeslips from the Link (by making it Inactive or Closed).

Viewing and changing Client billing information

The Billing Info view of File Details shows the Timeslips Client billing address and communications information, which may be different from the Amicus Contact information. The view also provides a checkbox for synchronizing this information with the Primary Client Contact record in Amicus Attorney, or a New button for creating a new Contact record in Amicus Attorney based on this information.

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 address and communications information is synchronized on exchange. You can edit it in either Timeslips or Amicus Attorney, and the other application will be updated after an exchange is performed.

Depending on which application has been given precedence by your Amicus Administrator in the Link setup, one application will update the other application if the same record in both applications has been modified.

Select the On Exchange Also Update The Primary Client checkbox if you want the corresponding information in the Amicus Primary Client Contact record for the Primary Client to be kept in synchronization. This synchronization occurs whenever:

- the information is updated in the Accounting Link Details dialog (either directly or due to an exchange of the File)
- the information is updated in the Client Contact record (either directly or due to synchronization with another File that the Contact is the Primary Client on).

Assigning a Primary Client to the File

When an Amicus File is created by the Link (based on a Timeslips Client), a Primary Client is NOT automatically assigned to the File. A message at the bottom right of the Accounting Link Details view warns you of this condition.

If you wish, you can assign an **existing Amicus Contact** as Primary Client on the File. To do this, navigate to the Admin > General view of the Amicus File, click the Select People button under the Primary Client heading, select a Contact in the dialog that appears, and click OK.

Or, you can create a **new Amicus Contact** record based on the information shown in this dialog, and automatically assign them to this File as the Primary Client. To do this, click New. The New Primary Client dialog appears.

Select the type of Contact record you wish to create (Individual or Company), fill in the Contact's name, and select the Contact Address and Communication fields you want to use to store the information from the Accounting Link Details dialog. Then click OK.

Exchanging an individual File

One method of exchanging an Amicus File with a Timeslips Client is the individual File exchange. This involves a single File and the corresponding Timeslips Client.

To exchange a single File, 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: If the Amicus File and corresponding Timeslips Client both have been modified, one record will overwrite the mapped fields in the other record based on the Exchange Priority set by your Amicus Administrator in the Link Configuration wizard.

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 Timeslips during an exchange, please consult your Timeslips documentation.

Global exchange

Your Amicus Administrator can do a global exchange, which involves all Files/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.

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 Timeslips during an exchange, please consult your Timeslips documentation.

NOTE: If both the Amicus File and the corresponding Timeslips Client have been modified, one record will overwrite the mapped fields in the other record based on the Exchange Priority set by your Amicus Administrator in the Link Configuration wizard.

Posting Time Entries to Timeslips

You can post Time Entries directly from Amicus Attorney to Timeslips, 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 Timeslips Client.
- The Timekeeper who owns the Time Entry must be mapped to a valid Timeslips Timekeeper.
- The Activity/Task code assigned to the Time Entry must be mapped to an equivalent in Timeslips.
- The Rate assigned to the Time Entry must be mapped to an equivalent Timeslips Rate.

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" chapter of the User Guide.

Amicus 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 Timeslips. 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

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 Timeslips

You can post Expenses directly from Amicus Attorney to Timeslips. 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 Timeslips Client—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 be mapped to a valid Timeslips Timekeeper.
- The applicable Amicus Expense Code must be mapped to a valid Timeslips Expense.

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 an Expense for that Timekeeper.

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        416-977-6633

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