



Amicus Link Guide: Outlook/Exchange E-mail

Synchronize your Amicus and Outlook e-mail. Choose a client-side link with your local Microsoft Outlook® or a Server-side link with Microsoft Exchange™.

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Document Conventions

- **OUTLOOK** Instructions for Outlook Standalone configuration

- **EXCHANGE** Instructions for Microsoft Exchange configuration

The following typographical conventions are used in the documentation:

- Text that you should enter exactly as printed is shown in Courier font, e.g. 7/03/2024.
- Keys that you press are shown in uppercase within angle brackets, e.g. <DELETE>.

About the Link

E-mail integration with Microsoft Outlook or Exchange gives you the ability to view, save, and manage your e-mails, including attachments, directly from Amicus. You can also configure this feature to automatically save e-mails to Amicus based on a variety of rules.

Outlook e-mails will appear in your Communications module in Amicus, and an optional embedded Outlook view is available for those who prefer the familiarity of that interface. Your e-mail lists in Outlook will indicate whether an e-mail has been saved to Amicus, whether it has been dealt with, and the name of the File, if any, it is associated with.

Amicus supports integration with either Outlook as a standalone client-side integration, or Microsoft Exchange which is a server-side integration.

A Configuration wizard guides the Amicus Administrator and Firm Members through the steps necessary for setting up and initializing the Link. Information is provided on resetting the Link, and ensuring that the feature runs smoothly.



NOTE: *Contacts & Calendar Integration* is a related feature that integrates your contacts, appointments, and tasks. It shares Firm Settings with the E-mail Link, but has its own Firm Member Preference settings. For details, please see the Amicus Outlook/Exchange Contacts & Calendar Link Guide.

What you need

Installed on the Amicus Application Server:

- Amicus Attorney (with or without Amicus Billing) accessible from the user workstations

Installed on the workstations of users who wish to configure and use the Link:

- Amicus Attorney Workstation
- Microsoft Outlook

If firm selects Exchange (server-side) Link:

- Microsoft Exchange installed locally on one of the firm's servers or used in a hosted configuration (including Office 365):

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



IMPORTANT: Ensure that the **Windows Time Zone and Date/Time settings** on all Workstations match those on the Amicus Application Server, Amicus Database Server (if SQL Server is installed separately), and your Microsoft Exchange Server (if applicable). That is, ensure that the time and date is synchronized across all these computers, typically against an Internet-provided UTC clock service.



CAUTION: The use of third-party utilities with Outlook (such as an e-mail logger) could affect the proper functioning of the Link and might even cause data corruption.

Link overview

Once configured, e-mails and their attachments can be accessed from within Amicus, and Firm Members can choose whether to save a copy of an e-mail and/or its attachments as an Amicus record with associations to a File and/or Contact. Each Firm Member can configure their Preferences to create these saved records automatically based on various rules.

Why use the Microsoft Exchange configuration rather than Outlook standalone?

Those who configure Amicus to support e-mail integration through Microsoft Exchange will enjoy the added benefit of 'always on' synchronization that occurs automatically based on a regular polling interval, *regardless of whether they are logged in to Amicus and whether a local Outlook client is running on their workstation*. This is especially beneficial for those who have configured their Preference for auto-saving of e-mails.

And Firm Members can of course access their Exchange account via a local Outlook on their desktop or another desktop provided they have configured their Outlook Profile, or Outlook Web App or Office 365 through a browser.

Auto-saving e-mail

Each Firm Member can configure their E-mail Link preferences to specify that e-mails be automatically saved.

- *Inbox e-mail* are auto-saved as Amicus E-mail records when the sender (From field) matches a) one of your Amicus Contact e-mail addresses, or b) the e-mail address of your specified Firm Members, and
- *Sent Items* e-mail are auto-saved as Amicus E-mail records when the recipient (To field) matches one of your Amicus Contact e-mail addresses.
- Attachments can also be optionally auto-saved but this will occur only if there is a File associated with the e-mail.

OUTLOOK: When synchronizations occur:

- When you first enable the Link through your Preferences (the first sync is called *initialization*).
- Automatically while you remain logged in to Amicus, according to the optional sync period you specified when setting up the Link.
- When you choose Synchronize Now on the Amicus Toolbar at the bottom in the Communications module.
- When you reset the Link.

If Outlook is not already running when you do a sync in Amicus, it will start automatically as a background process (not shown in your Windows Taskbar) and your usual Outlook startup prompts, if any, will appear. Activity during the sync or deletion process is noted in the Amicus Status Bar.

EXCHANGE: When synchronizations occur:

- When the Amicus Administrator first enables the Link for you (the first sync is called *initialization*).
- Automatically on a regular polling interval, regardless of whether you are logged in to Amicus and whether your local Outlook is running.
- When you choose Synchronize Now on the Amicus Toolbar at the bottom in the Communications module.
- When the Amicus Administrator resets the Link for you.

Administering the Link at the Firm level



NOTE: If you use both Microsoft Exchange and Office 365 you must Upgrade to Advanced Authentication (OAuth) for Office 365.

Amicus Administrator checklist

- 1 Read this *Amicus Outlook/Exchange E-mail Link Guide*.
- 2 **OUTLOOK:** Log in to Amicus at a workstation where Outlook is available.
- 3 In the Firm Settings view of the Office module, open the Outlook/Exchange Link – Contacts, Calendar, and E-mail dialog. Click Configure to complete the Firm Configuration wizard, selecting the appropriate Link method.
- 4 Advise Firm Members to configure the link through their Preferences.
- 5 Firm Members configure their Link in Amicus

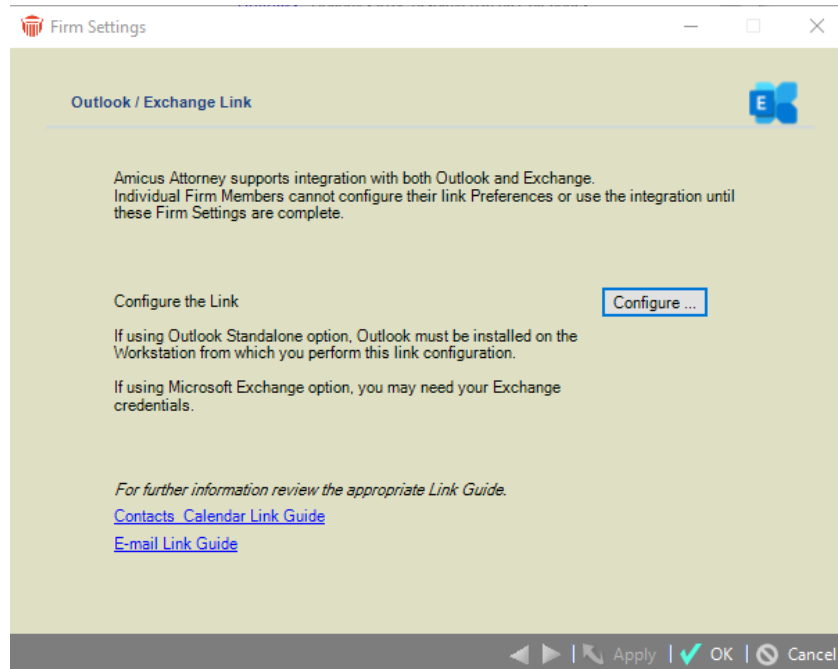
EXCHANGE: Upon completing the Preferences configuration, Firm Members will trigger a Sticky to all Administrators, requesting initialization. Schedule each initialization to be run during off-hours through the Firm Setting for Exchange Management.

Configuring the Firm Settings

Choose Firm Settings on the navigation list in the control panel in the Amicus Office module. Choose Outlook/Exchange Link – Contacts, Calendar, and E-mail on the navigation list in the Firm Settings dialog that appears.



The Outlook/Exchange Link view appears.

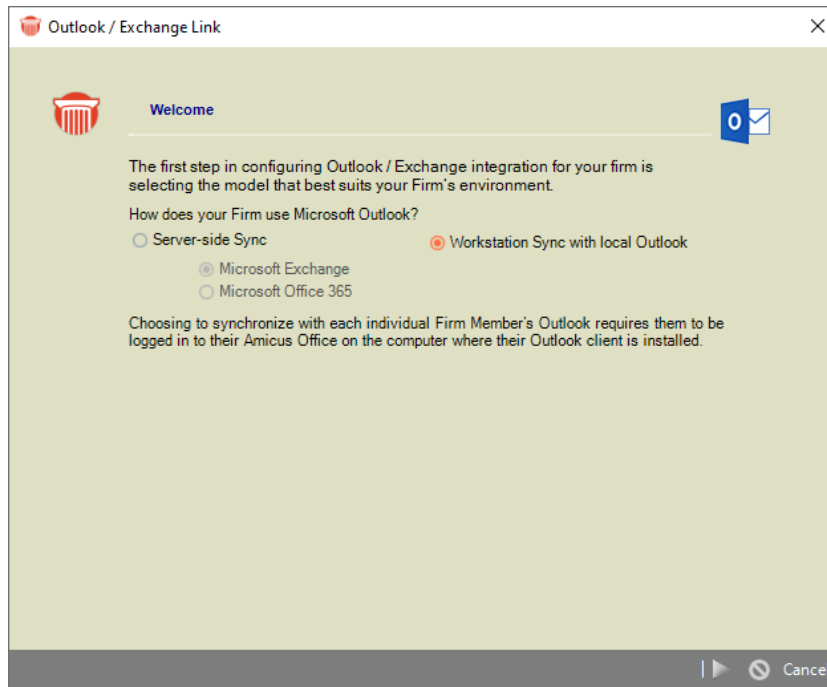


Click Configure to start the Outlook/Exchange Link Firm Configuration wizard. The Welcome dialog of the wizard appears. Complete each of the dialogs in the wizard, as described in the following sections.

OUTLOOK: If Advanced Security for Outlook prompts appear during configuration or initialization, select the Allow Access action and the Always Perform This Action For This File option, and click OK.

Specifying how your firm uses Outlook with Amicus

In the Welcome dialog, configure the Link based on the way that your firm uses Outlook.



Select Outlook Standalone (Workstation sync with local Outlook) or Outlook with Microsoft Exchange (Server-side sync).

This setting affects both the E-mail Link and the Contacts & Calendar Link.

Effect on existing Link users

- If you **switch from Outlook to Exchange** for the firm, any Firm Members who have the Outlook client-side Link enabled will continue to sync with that method.
- If you **switch from Exchange to Outlook** for the firm, any Firm Members who have the Exchange Link enabled will no longer sync with that method. Their Links will no longer be enabled and the Exchange option will be removed from preferences. Any scheduled Exchange Link initializations or resets will be cancelled.

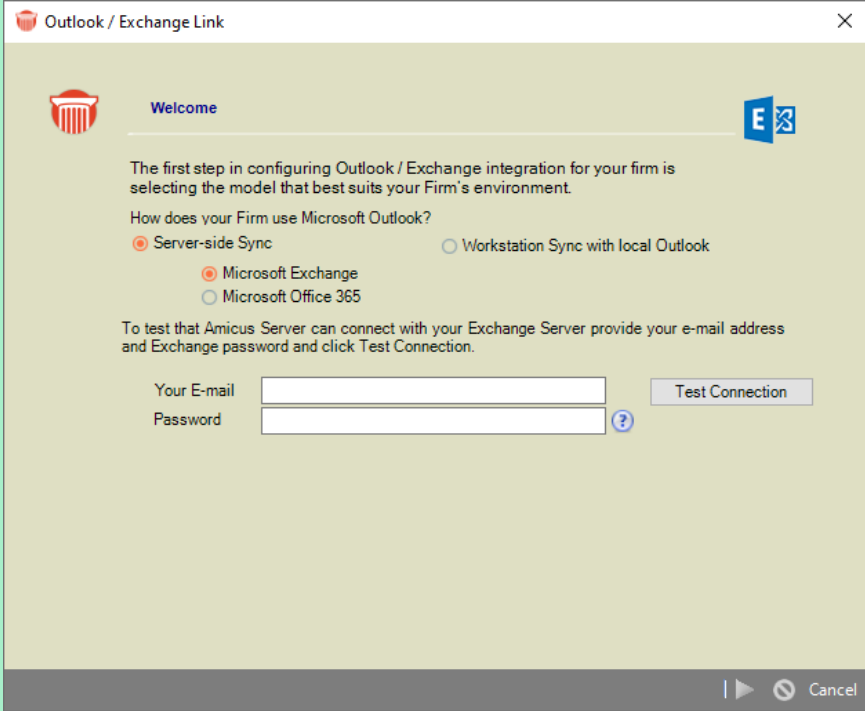
EXCHANGE: Specifying your Exchange credentials

Amicus now allows for Token-based authentication, although users can continue to connect by entering their Exchange E-mail address and password.

Microsoft Exchange

Selecting the **Microsoft Exchange** radio button means your firm controls the hardware and infrastructure.

Enter your Exchange **E-mail** address and **Password**.



Outlook / Exchange Link

Welcome

The first step in configuring Outlook / Exchange integration for your firm is selecting the model that best suits your Firm's environment.

How does your Firm use Microsoft Outlook?

Server-side Sync Workstation Sync with local Outlook

Microsoft Exchange Microsoft Office 365

To test that Amicus Server can connect with your Exchange Server provide your e-mail address and Exchange password and click Test Connection.

Your E-mail

Password ?

Test Connection

Cancel

Then click Test Connection.

If the connection fails, providing additional information might help:

- Your network domain name
- Your user name for logging in to your computer on the firm's network (which might be the same as your e-mail address)
- Your Exchange Server address (e.g. "mail.firmname.com")
 - if using Microsoft 365. enter "outlook.office365.com"

Then click Test Connection again.

Microsoft Office 365

Selecting the Microsoft Office 365 radio button allows for more scalability and flexibility. Select the appropriate radio button to indicate your Exchange is provided through a Microsoft Office 365 account and enter Your E-mail in the field provided.

Amicus Attorney supports integration with both Outlook and Exchange. Individual Firm Members cannot configure their link Preferences or use the integration until these Firm Settings are complete.

Configure the Link [Configure ...](#)

If using Outlook Standalone option, Outlook must be installed on the Workstation from which you are configuring the link.

If using Microsoft Exchange credentials.

For further information, see [Contacts, Calendar and E-mail Link Guide](#).

Welcome

The first step in configuring Outlook / Exchange integration for your firm is selecting the model that best suits your Firm's environment.

How does your Firm use Microsoft Outlook?

Server-side Sync Workstation Sync with local Outlook

Microsoft Exchange Microsoft Office 365

To test that Amicus Server can connect with your Exchange Server provide your e-mail address and Exchange password and click Test Connection.

Your E-mail [Authenticate](#)

Sign in to your account

Microsoft

Pick an account

- Heather Gavel
HGavel@gmail.com
Connected to Windows
- bdonnell@gavel.com
- Use another account

[Back](#)

Test connection was successful.

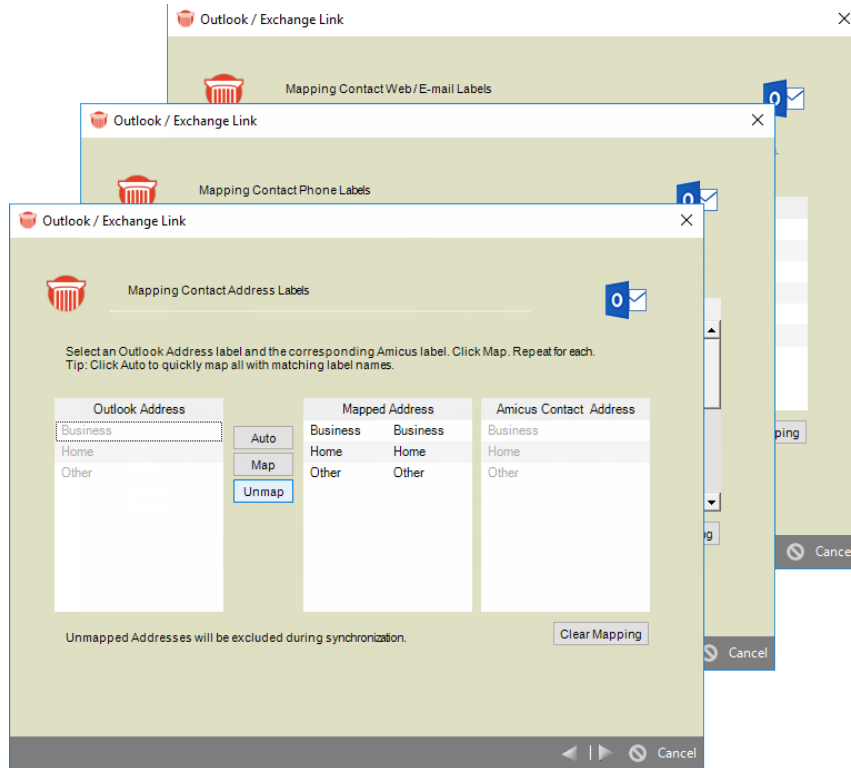
[Next](#) [Cancel](#)

Then click Authenticate.

Select an account from the list that appears or click the plus icon to sign into another Office 365 account. You are returned to the Outlook/Exchange window. Test connection was successful displays in the box at the bottom of the window. Click the Next button to continue the mapping process.

Mapping Contact Address, Phone, Fax, Email, and Web labels

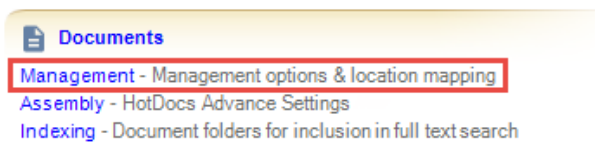
These mappings are needed only for the Outlook/Exchange Contacts & Calendar Link. You can ignore them if no Firm Members will be using that Link. For details, see the *Outlook/Exchange Contacts & Calendar Link Guide*.



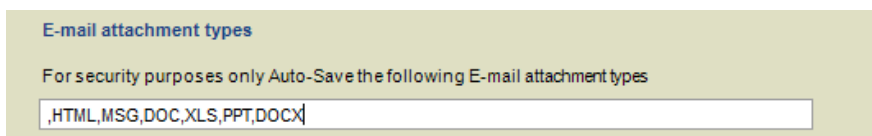
Configuring e-mail attachment types for the firm

Firm Members who choose to allow e-mail to be Auto-Saved to Amicus can optionally also choose to auto-save attachments. As an Administrator, you can control which formats are permitted—this will help prevent undesirable attachments (such as graphic signatures or .EXE files) from being saved:

- 1 Go to the Office module, choose Firm Settings, and click Documents - Management.



- 2 Enter the file types to be saved, separated by commas (e.g. DOC,PDF,TXT).



Note that .MSG attachments cannot be saved.

What's next

Each Firm Member must set their own Link preferences through the Link Configuration wizard (available from the Preferences view of the Office module in Amicus). Configuring the Firm Member workstation

Firm Member checklist

Each Firm Member should complete the following steps to initialize their Link.

- 1 Read this *Outlook/Exchange E-mail Link Guide*.
- 2 Assess your Outlook Mailbox. Delete or archive any unnecessary Outlook records (optional).
- 3 Set your Link preferences through the Link Wizard (available from the Preferences view of the Office module).
- 4 **OUTLOOK: IMPORTANT** - Back up your Outlook database before initializing your Link. See your Outlook Help or your System Administrator for details.
- 5 **OUTLOOK:** Coordinate with your Amicus Administrator as to when to start the Link initialization (Step 4 of the Link Wizard).

EXCHANGE: From Step 4 of the Link Wizard, click the Send Sticky button to inform your Amicus Administrator that you're ready for Link initialization, and they'll schedule that automatic processing (usually off-hours for Server optimization).

Assessing your Mailbox

Before you enable the E-mail Link for the first time, you should assess the current state of your Mailbox. Consideration should be given to the volume and the type of historical e-mails you wish to incorporate into your firm's database.

If you choose to auto-save e-mails from a specified date, then when you initiate the Link, all e-mails in your **Inbox** and **Sent Items** mail folders on and after that date will be processed for saving based on the sender or recipient matching one of your Contacts and optionally Firm Members, subject to your exclusion and inclusion settings. If you want to auto-save e-mails stored in subfolders or any other folders of your Mailbox, move them to your main folders or manually manage these e-mails from your Amicus Outlook view. Attachments on auto-saved e-mails may be saved as Documents according to your Preferences.

Preferences enable you to exclude some e-mails: Contacts to be ignored, the date prior to which any e-mails will be ignored, and a requirement that the Contacts be associated with no more than one of your Files. You may also include e-mails from specified Firm Members. If you have a large number of e-mails in your Mailbox, initialization will impact Amicus performance because each e-mail (and optionally, including attachments) will be processed for possible association with your Amicus data. This process should be run off-hours.

OUTLOOK: Using an Internet e-mail account

Amicus can access your Internet e-mail account, provided that your Link is configured for Outlook Standalone, and Outlook has been properly configured to ensure that:

- You have established a connection with your mail server through the Internet.
- You have configured Outlook with your POP3 and SMTP Server names. (The Link does not support IMAP connections.)

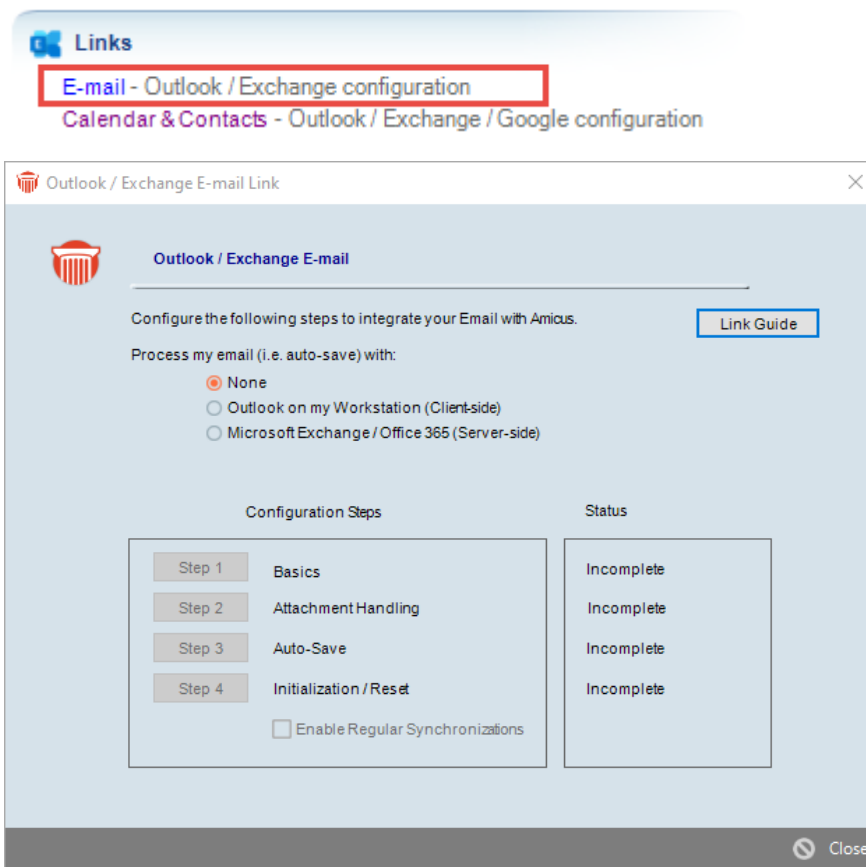
You may optionally configure Outlook settings to remember your password. If you choose not to use this option, you will be prompted for this information upon logging in to Amicus.

You may want to check your settings for how often an automatic send/receive is scheduled when Outlook is offline or online. (In Outlook, go to Tools > Options > Mail Setup and click Send/Receive.)

If you use an e-mail POP3 account, an Amicus preference allows you to indicate whether the e-mail provider's Send/Receive command should be executed automatically to update your mailbox and, if so, how frequently (e.g. every 10 minutes). We recommend that you set this option if you do not always have Outlook running.

Setting Firm Member Link preferences

- 1 Choose **Preferences** on the navigation list in the control panel in the Office module.
- 2 Select Links > E-mail – Outlook/Exchange configuration.



- 3 Choose the Outlook (Client-side) or Exchange (Server-side) option if necessary. Which options are available depends on how your Amicus Administrator has configured the integration for the firm.
 - If you had the Outlook Client-side Link enabled and your Amicus Administrator has now set the firm to Exchange Server-side, you should reconfigure your settings. You may continue using your Link with Outlook as before but once you switch to Exchange, your Outlook Client-side integration will be automatically disabled and you won't be able to choose it again.

The current completion status of each configuration step is shown at the right.

Complete each of the steps in the configuration dialogs, as described in the following sections.

OUTLOOK: We strongly recommend that Firm Members configure and enable the Outlook Client-side Link at only one workstation and with only one Outlook Mailbox. Otherwise, confusing results and a loss of data may occur.

Step 1 - Specify your basic sync settings

EXCHANGE: On the first screen, specify your e-mail address and password for that account, and then click Test Connection. If Exchange is provided through a Microsoft Office 365, ensure that you are currently logged in to that account via the Web at this computer.

If the connection fails, providing additional information might help:

- your firm's network domain name
- your user name for logging in to your computer on the firm's network
- your Exchange Server address (e.g. "mail.firmname.com")

You might need to contact your firm's IT administrator if you do not know the domain name.

If you previously configured your account on a mobile device such as an iPhone, the domain name will be listed in the account settings on the phone.

Then click Test Connection again.

Exchange syncs occur frequently and automatically, regardless of whether you're logged in to Amicus.

If your Exchange credentials change after initialization: You must update these settings in Amicus or your Link will stop working. Simply return to this screen, enter your new password, click Test Connection, and then click Finish.

The screenshot shows a window titled "Outlook E-mail Link" with a close button (X) in the top right corner. The window content is titled "Email - Basics" and features a blue Outlook icon in the top right. The settings are as follows:

- Limit date range for Unsavd E-mail in the Communications module to the last days
(This setting will affect performance. Sent Unsavd items do not display in the Outstanding view.)
- Show the embedded view of my Outlook mail in the Communications module
- Enable the Amicus Taskbar within Outlook
- I use an Internet e-mail account (POP3). Schedule an automatic send/receive every minute(s).
- Auto-Delete**
 - When Saved/Unsavd E-mail is deleted in Amicus, also delete in Outlook / Exchange
- Timer**
 - Start Timer when E-mail is created (if associated with one Amicus File)
- Delivery & Read Receipt**
- Include Delivery Receipt for new outgoing email
- Include Read Receipt for new outgoing email

At the bottom right, there are two buttons: a green checkmark icon followed by "Finish" and a grey circle with a diagonal slash followed by "Cancel".

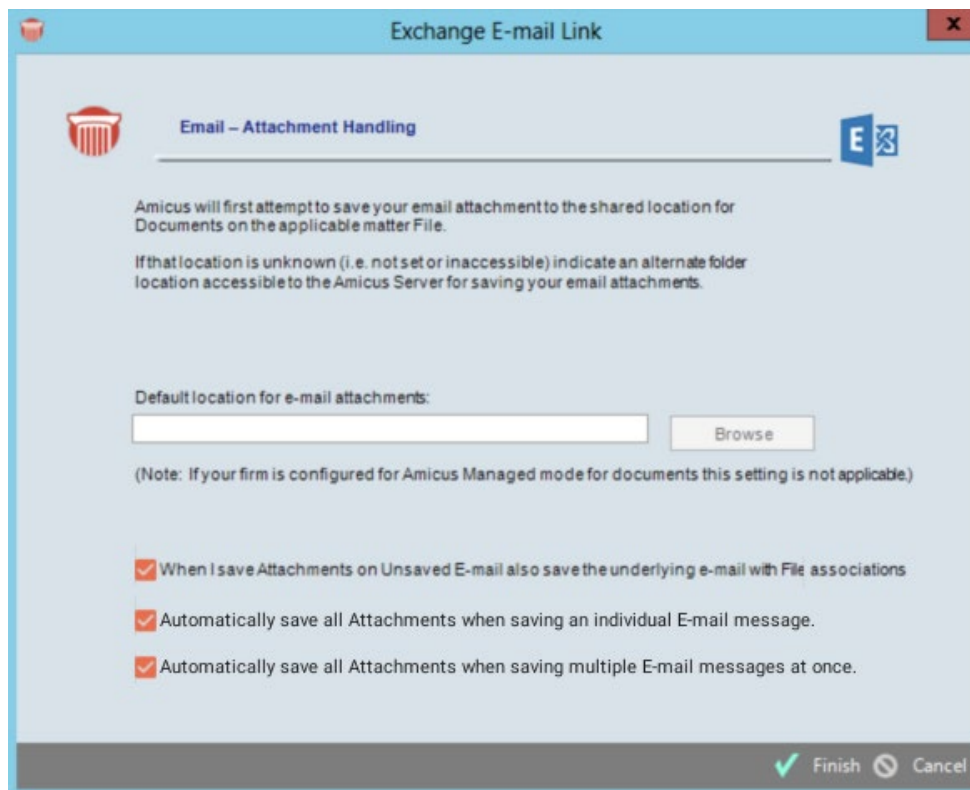
- Number of days for which unsaved e-mails can be displayed in the All and Outstanding views of the Communications module. Setting a large number will affect performance. Note that the Outstanding view shows only *incoming* unsaved e-mails.
- Show the embedded Outlook view in the Communications module. This view lets you perform Outlook-based actions on your e-mails, including accessing all of your Outlook mail folders.



TIP: If you turn off Auto-Save in Step 3 and you wish to forward Saved E-mails (associated with a File) via right-click commands in the embedded Outlook view, we recommend that you enable and activate the Amicus Tasks Toolbar. (To activate the Toolbar, click on any button each time Outlook is started.)

- Enable the Amicus Tasks Toolbar within Outlook. (The Toolbar must be installed first—see “Setting Up Your Office > Document Assembly preferences” in User Help) You might need to restart Outlook for this change to take effect.
- **OUTLOOK:** If you use an e-mail POP3 account (rather than Microsoft Exchange), indicate whether the e-mail provider’s Send/Receive command should be executed automatically to update your mailbox and, if so, how frequently (e.g. every 10 minutes). We recommend that you set this option if you do not always have Outlook running.
- When an Amicus Saved or unsaved E-mail is deleted from Amicus, automatically delete the original Outlook e-mail. (When an E-mail is saved in Amicus, the Outlook e-mail item is not removed from your Outlook Mailbox.) Deleting an Outlook e-mail directly from your Communications Outlook view, or from within Outlook itself, will not delete any related saved Amicus record, but it will affect the accessibility of any e-mail attachments not separately saved to Amicus.
- Start the Timer automatically whenever you create a new E-mail that is associated with a File.

Step 2 - Specify how attachments are handled



- If you are in a *User-Managed Documents environment*, you'll need to specify the default location for saving your e-mail attachments—you could create a folder named `ATTACHMENTS` for this purpose. This is NOT required if the firm is configured for Amicus-Managed Documents.

In the box, click **Browse** and find the folder. A UNC path is recommended—specify the computer name and full path. For example, enter `\\Alaska\ATTACHMENTS` if the document attachments are to be saved in the `\ATTACHMENTS` folder on the computer named Alaska.

Attachments will be auto-saved to automatically created, separate subfolders within your specified location: `\Today's date\First 19 characters of the subject_Encoded message ID`

- Select from the following options:
 - Manually save attachments on an Unsaved E-mail in Amicus, the underlying E-mail will be automatically saved as well (associated to the same File to which the attachments are saved).
 - Automatically save all Attachments when saving an individual E-mail message
 - Automatically save all Attachments when saving multiple E-mail messages at one time.
 - Users can setup the preferences to have different behavior for mass-saved or single-saved email messages.

Step 3 - Specify your auto-save settings

Specify whether e-mails in your Outlook Inbox and Sent Items mail folders are automatically saved as Amicus E-mail records when the sender or recipient matches any of your Amicus Contact e-mail addresses, or the sender is one of your specified Firm Members. (The From field is used in incoming e-mails and the To field is used in outgoing e-mails. The Cc and Bcc fields are ignored.)

The screenshot shows the 'Outlook E-mail Link' dialog box with the 'Email - Auto-Save' section. The 'Auto-save E-mail sent/received in my e-mail program where the Sender/Recipient matches one of my Amicus Contacts' checkbox is checked. Below this, there are two columns: 'Exclude Contacts' and 'Include Firm Members'. The 'Exclude Contacts' column has a list with 'John Doe' and a 'Select People' button. The 'Include Firm Members' column has a list with 'Heather Gavel' and a 'Select People' button. There is also an unchecked checkbox for 'E-mail when Contact is on more than one File'. At the bottom, there are radio buttons for 'Auto-Save Attachments': 'Only if there is a File assigned*' (selected) and 'Never auto-save attachments'. A note below the radio buttons states: '*AMICUS FILE ASSIGNMENT automatically occurs when the Contact address is associated with only one of your Amicus Files.' At the bottom right, there are 'Finish' and 'Cancel' buttons.

- Optionally **exclude** e-mails in the following cases:
 - E-mails sent to or received from *selected Contacts*. For example, you may wish to exclude family members who are in your Amicus Contact list. Click the Select People button to change the list.
 - E-mails where the sender or recipient *Contacts are associated with more than one of your Files*. You would choose this option if you want more control over e-mail associations at the time of saving it as an Amicus record.
- Optionally **include** e-mails in the following cases:
 - E-mails you send to or receive from *selected Firm Members*. Click the Select People button to change the list.

Changing these settings later will affect only the e-mails received from then onward.

Attachments

Choose whether e-mail attachments are automatically saved to Amicus as Amicus Document records when the incoming e-mails are auto-saved (provided there is a File assignment). These Document records are associated with both the E-mail record and the File.

Your Amicus Administrator can block certain attachment types from being automatically saved in order to manage undesirable Document records in your Amicus database, such as graphic signatures, etc. Note that MSG format attachments are never saved.

Start date

For initialization purposes, you must set the start date for the auto-save feature—see the appropriate “Initializing the Link” section. Use discretion when setting this date—it will impact Server performance.

OUTLOOK: Initializing the Link

OUTLOOK: Consider the following important points before choosing to Initialize:



- Initialize and run subsequent synchronizations from only one workstation, otherwise you may experience confusing results or data loss.
- Initialization can be a quite lengthy process, depending on the amount of email included in your auto-save range and the setting for the number of days to be shown in the Outstanding view of your Communications module. We recommend that you perform this task during off-hours.

When ready, go to Step 4 in the Wizard.

Configuration Steps		Status
Step 1	Basics	Complete
Step 2	Attachment Handling	Complete
Step 3	Auto-Save	Complete
Step 4	Initialization / Reset	Incomplete

Enable Regular Synchronizations

Outlook E-mail Link [Close]

 **E-mail – Initialization / Reset** 

Complete the checklist and click Begin Process when ready.

- Review the [User Guide](#)
- Apply my auto-save settings to my email sent/received:
 - Since

Note: This will affect the length of time required for processing.

- I am currently logged in to my customary workstation where my Outlook is configured.
- I am ready to begin processing my e-mail.

This process can be quite lengthy depending on the amount of the email included in your auto-save range and the setting for the number of days shown in the Outstanding view of your Communication module. It is recommended that you perform this task during off-hours.

DO NOT LOG OUT OF AMICUS UNTIL THIS PROCESS IS COMPLETED.

Begin Process Cancel

Set the start date for the auto-save feature – e-mails dated earlier will not be auto-saved but you can manually save them.

Check the remaining items in the list.

Click **Begin Process**. You may see an Advanced Security for Outlook prompt. Select the Allow Access action and the Always Perform This Action For This File option.



EXCHANGE: Initializing the Link

EXCHANGE: When ready, go to Step 4 in the Wizard.

Configuration Steps		Status
Step 1	Basics	Complete
Step 2	Attachment Handling	Complete
Step 3	Auto-Save	Complete
Step 4	Initialization / Reset	Incomplete

Enable Regular Synchronizations

Outlook E-mail Link [X]

 **E-mail – Initialization / Reset** 

Complete the checklist and click Begin Process when ready.

- Review the [User Guide](#)
- Apply my auto-save settings to my email sent/received:
 - Since

Note: This will affect the length of time required for processing.

- I am currently logged in to my customary workstation where my Outlook is configured.
- I am ready to begin processing my e-mail.

This process can be quite lengthy depending on the amount of the email included in your auto-save range and the setting for the number of days shown in the Outstanding view of your Communication module. It is recommended that you perform this task during off-hours.

DO NOT LOG OUT OF AMICUS UNTIL THIS PROCESS IS COMPLETED.

Begin Process

Set the start date for the auto-save feature – e-mails dated earlier will not be auto-saved.

Check the remaining items in the list.

Click **Send Sticky** to advise your Amicus Administrators that you're ready for initialization. Your Administrator will schedule your initialization at an appropriate time, likely during off-hours. Initialization can be a quite lengthy process, depending on the amount of email included in your auto-save range and the setting for the number of days to be shown in the Outstanding view of your Communications module

You'll be informed by Sticky when your initialization has completed, at which time your link will be enabled and begin synchronizing on a regular polling interval (approximately every 15 minutes).

Changing your Preferences

After initialization, you can edit your Link configuration to enable/disable or change the auto-save feature or other preferences. Those changes will take effect upon the next sync.

Showing Amicus information in Outlook lists

For convenience, we recommend that you display the Amicus Status, Amicus File Name, Amicus Dealt With, and Amicus Time Entry fields in your Outlook Inbox and Sent Items list views. This enables you to tell at a glance whether an e-mail has been saved to Amicus – useful in the Outlook embedded view.

(Note: These fields are not available in OWA or Office 360.)

- **AmicusStatus**—indicates whether the e-mail has been saved as an E-mail record in Amicus or has been marked Ignore
- **AmicusFileName**—names of associated Files on a Saved E-mail, if any
- **AmicusFileIds**—internal IDs of associated Files on a Saved E-mail, if any
- **AmicusDealtWith**—indicates whether the e-mail has been dealt with (and so not shown in the Outstanding view of the Communications module)
- **AmicusTimeEntry**—indicates whether an Amicus Time Entry has been created for the e-mail

These fields might appear automatically but, if not, you may set them manually by completing the following steps:

- 1 In Outlook, open your Inbox folder.
- 2 Right-click on the From/Subject/etc. header above the e-mail list, and choose Customize Current View in the menu that appears.
- 3 In the Customize View dialog, click Fields.
- 4 In the Show Fields dialog, choose "User-defined fields" in the Select Available Fields From list box, add the Amicus fields from the Available Fields list at the left to the Show These Fields list at the right, and rearrange the order of fields if desired. Click OK twice.
- 5 Open your Sent Items folder and repeat steps 2 to 4.

Initialize your Outlook e-mail signature block (Optional)

In Outlook, a defined signature block can be configured for automatic inclusion in new e-mails that you send. That same signature block will be applied to the e-mails you send from Amicus. For example, your signature block for new messages could include graphics, your full name, position, company name, and other details, as well as formatting.

- 1 Go to the Outlook view of the Communications module.
- 2 From the Actions > Outlook Email menu, choose Set Outlook Signature.



NOTE: If you later change the signature settings in Outlook, choose Set Outlook Signature again to update your e-mail signature in Amicus.

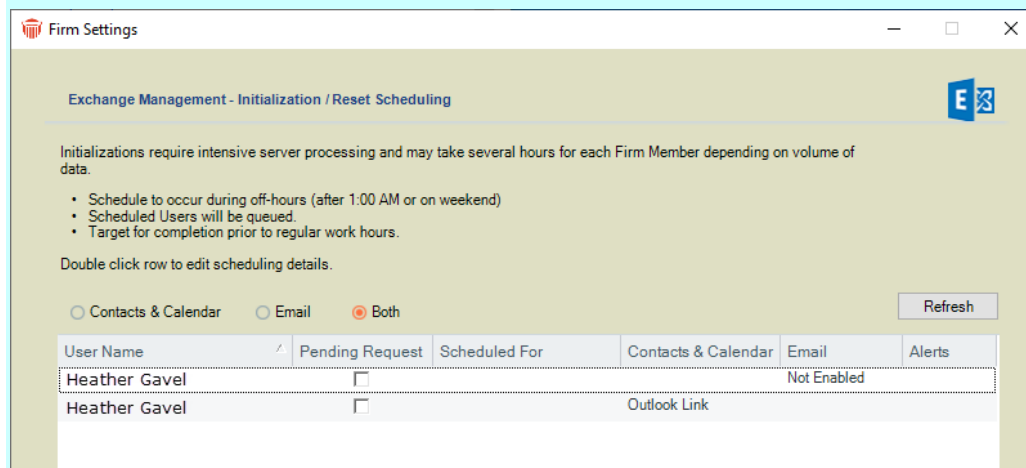
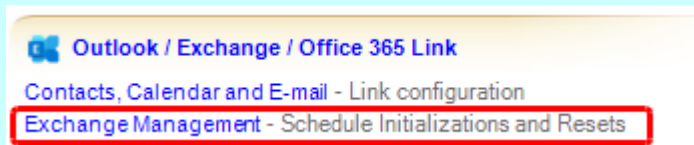
EXCHANGE: Managing initializations and resets by Administrators

EXCHANGE: While individual Firm Members are responsible for setting their own Preferences, initializations and resets of the Exchange Link are managed by your Amicus Administrator. The last Preference step triggers a Sticky message to all Amicus Administrators in your Firm advising them that this user ready for Initialization. A similar step is part of the Reset process.

An Exchange Management view is available only to Administrators and only if the Firm is configured to use the link with Exchange.

To access this view:

In Office > Firm Settings, choose Outlook/Exchange Link – Exchange Management.



Choose the “Email” or “Both” option to filter the list to active Firm Members who have configured E-mail synchronization. Their current status is shown:

Enabled	Configured and initialized to sync with Exchange. Regular syncs occurring.
Not Enabled	Configured for Exchange but not Enabled. No regular syncs occurring.
Pending	Initialization or reset has been requested but has not been scheduled.
Scheduled	Initialization or reset has been scheduled but has not yet occurred. The scheduled date/time will appear in the Scheduled column.
Outlook Link	Configured to sync directly with local Outlook client. It's recommended that you encourage this user to switch to linking with Exchange.

Scheduling an initialization or reset

To schedule an individual whose status is Pending or Scheduled, click the desired row to open the Exchange Status view of the Firm Member's Administration Profile.

The screenshot shows the 'Administration Profile - Heather Gavel' window. At the top, there are checkboxes for 'Timekeeper' (checked), 'Librarian' (checked), and 'Administrator' (checked). To the right, there are dropdown menus for 'Type' (set to 'Managing Partner') and 'E-Billing Position' (set to 'Other'). Below this is a sidebar with navigation options: 'Security Attributes', 'Group Membership', 'New File Assignments', 'Billing Rates', and 'Exchange Status' (which is highlighted). The main content area shows two rows: 'Contacts & Calendar' and 'Email'. Both rows are in a 'Pending (Initialization)' state. The 'Email' row is highlighted with a red border. Each row has a 'Cancel Pending Status' button and a 'Scheduled For' field set to 'Today' at '08:00 PM'. At the bottom of the window, there is a note: '* It is recommended that you schedule processing to occur during off hours (after 1:00 AM or on weekend).' and 'OK' and 'Cancel' buttons.

Schedule the date and time. The process can be lengthy depending on the amount of data, and it is server-intensive, meaning that it may affect performance for those using Amicus. Take the following best practice recommendations into consideration:

- Schedule processing to occur during off-hours, after 1:00 am or on a weekend.
- Processing will occur automatically one Firm Member at a time, based on their scheduled start times—when one is completed, the next will start, even if it overlaps the next start time.
- Avoid overlap with nightly server processing (such as Amicus Daily Checks and backups)
- Target completion prior to the time that users normally login to Amicus.
- Generally avoid scheduling more than 3 or 4 users on a weeknight.

If you need to cancel the scheduling, click Cancel Pending Status in the Firm Member's Admin Profile.

Upon completion of an individual's Initialization or Reset, a Sticky message is sent to that Firm Member and to all Amicus Administrators. The Firm Member's Status is updated.

If an Initialization fails to complete, the Alert column in the Exchange Management will indicate this. Check the Log file for details. See "Troubleshooting" on page **Error! Bookmark not defined..**

Using the Link after initialization

Synchronizing information

OUTLOOK:

- A prompt appears whenever you log in to Amicus, if you have set your Link to do so. Synchronization will continue to occur periodically while you remain logged in.
- Click Synchronize Now on the Amicus Toolbar at the bottom in the Communications module. For example, you might have just read, moved, or deleted some unsaved e-mails in Outlook and want those changes reflected in Amicus right away.

During the sync process, "Synchronizing with Outlook" appears in the Amicus Status Bar.

EXCHANGE:

- Synchronization occurs frequently and automatically, regardless of whether you're logged in to Amicus.
- Click Synchronize Now on the Amicus Toolbar at the bottom in the Communications module. For example, you might have just read, moved, or deleted some unsaved e-mails in Outlook and want those changes reflected in Amicus right away.

Disabling the Link

Each Firm Member can temporarily stop regular synchronizations from occurring for themselves by clearing the Enable checkbox in their Preference.

Working with e-mails in Amicus

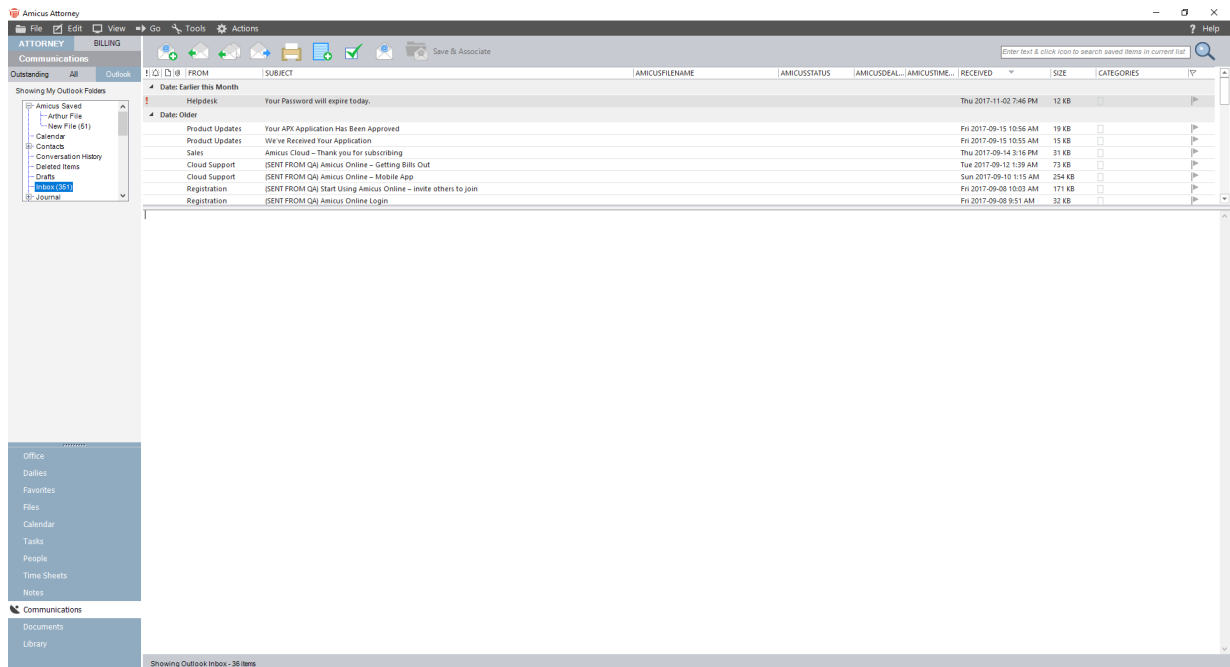
See the "Communications" and "Files > Using other facts about a File > Viewing Communications on a File" topics in the User Help:

- Places from which you can send a new e-mail
- Creating a new e-mail from a blank message
- Creating new e-mail from a merged message generated by an E-mail Merge Template
- Receiving e-mails automatically
- Saving an e-mail to Amicus
- Working with unsaved e-mails
- Working with Saved E-mails
- Managing e-mail attachments
- Viewing e-mail details

Both Outlook and Exchange configurations require a local Outlook client in order to support opening unsaved e-mail, creating new, replying or forwarding e-mail.

Using the embedded Outlook view of Communications

The Outlook view is available only if you have chosen the option to make it available.



This view is your Outlook Mail embedded in your Amicus Communications module. It includes the Outlook right-click commands to perform all available Outlook-based actions on Outlook e-mails, including: Open, Reply, Reply to All, Forward, Delete, and Print. However, we recommend that you use the commands in the Amicus Toolbar at the bottom (New & Save, Reply & Save, etc.), and the Save and Associate controls in the control panel, to perform the indicated actions. This will ensure that Amicus saves the sent e-mail, e-mail reply, or forwarded e-mail from this view.

Also see "Showing Amicus information in Outlook lists" on page 19.

EXCHANGE: This view is available from any workstation where your Outlook Profile is configured.

Saved and unsaved e-mail

Amicus allows you to view saved and unsaved e-mail. Saved E-mails are those that are stored as Amicus Communications records. Unsaved e-mails are those captured from your mailbox for display in Amicus but not yet saved as Amicus records.

- **Saved E-mails** are those that have been either auto-saved or explicitly saved as Amicus records by you or another Firm Member. They may optionally be associated with one or more of your Amicus Files and/or Contacts. You must enable the E-mail Link in order to save your e-mails.
- **Unsaved e-mails** are not Amicus records and have no association with File or Contact records. They are displayed only if you have the E-mail Link enabled. Generally, your sent unsaved e-mails are not considered to be Outstanding. Unsaved e-mails are denoted in lists by the following icon:



The Communications module allows you to view your e-mail by selecting various filters for viewing combinations of sent/received, saved/unsaved, outstanding and Today's e-mail. Your Today's Overview in the Dailies module also shows your e-mail. The Communications views of File and Contact Details show only associated Saved E-mail.

Working with Office 365 when Multi-factor Authentication is enabled

An App Password is required to give Amicus Attorney permission to access your Office 365 account if you have enabled Multi-factor Authentication (MFA).

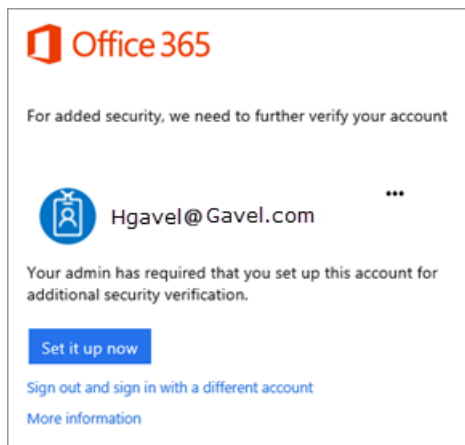
You are required to update your Firm Settings, as well as your Preferences to use the Exchange link in the Contact & Calendar synchronization and in the Email Integration.

Multi-factor Authentication (MFA) is an authentication process that requires a user to provide a second form of identification in addition to their password.

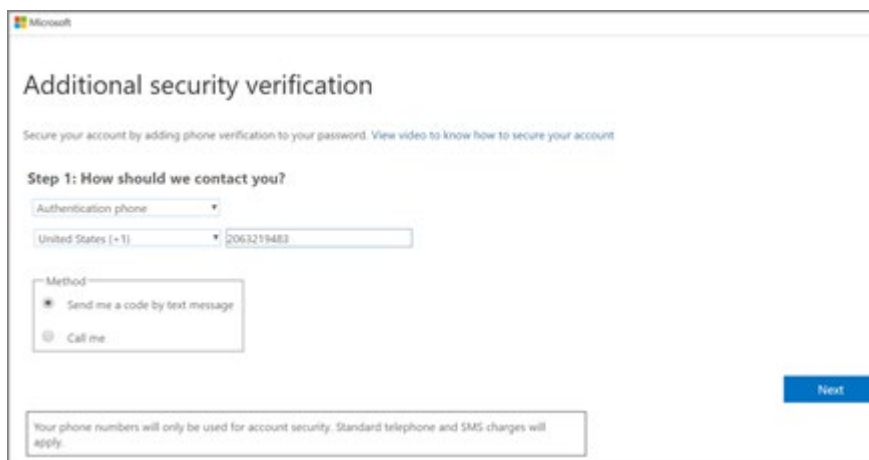
Retrieving your App Password for Office 365

Check whether your Office 365 Admin has turned on MFA for your account. If it is not turned on you will not see the following options in Office 365.

1. Sign into Office 365 with your regular password, click **Sign in** to display this screen.



2. Click **Set it up now** to display the **Additional security verification** screen.



3. In **Step 1** select your authentication method from the dropdown list and follow the prompts on the page.
4. After you verify your alternate contact method click **Next** to receive an app password that you can use with Outlook.

5. Click the **Copy** icon to copy the password to your clipboard.



Additional security verification

Secure your account by adding phone verification to your password. [View video to](#)

Step 3: Keep using your existing applications

In some apps, like Outlook, Apple Mail, and Microsoft Office, you can't use a phone password* to use in place of your work or school account password. [Learn more](#)

Get started with this app password:

yqkmpvmtmsfqb  

Creating an App Password

You will now want to create an App Password instead of using the code from the previous screen.

1. Sign into Office 365 with your regular password, click **Sign in** to display this screen.
2. Select **Security & privacy** from the left navigation pane and **Additional security verification** from the main screen.



Note: You will only see this option if your Admin has set up MFA for your firm.

Office 365 | My account

Security & privacy

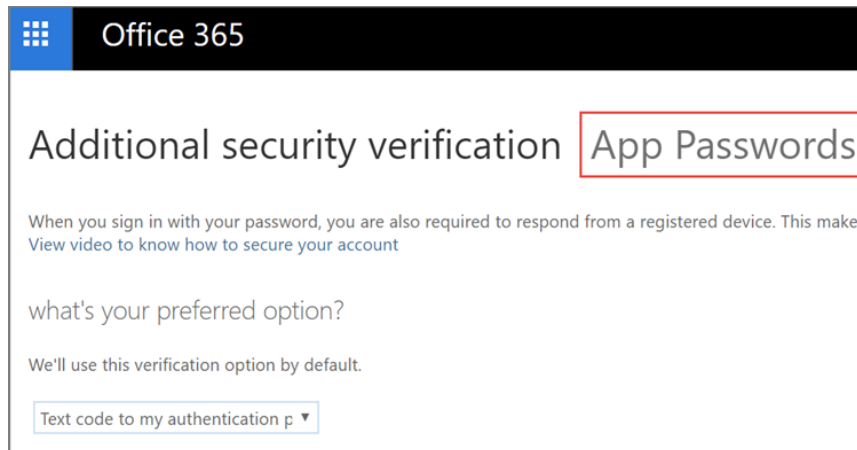
My account
Personal info
Subscriptions
Security & privacy

Password
Change your password.

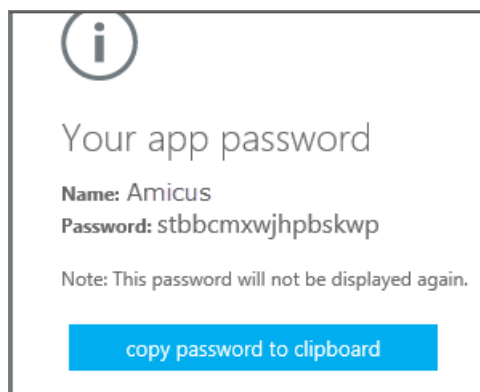
Contact preferences
Manage how and why you are contacted.

Additional security verification
Add or change your security verification settings.

3. Select **Update my phone numbers used for account security** from the dropdown list to display the following page:



4. Select **App Passwords** at the top of the page and choose **Create** to get an app password.
5. Type a name for your App Password such as “Amicus” and click **Next** to display **Your app password** screen.

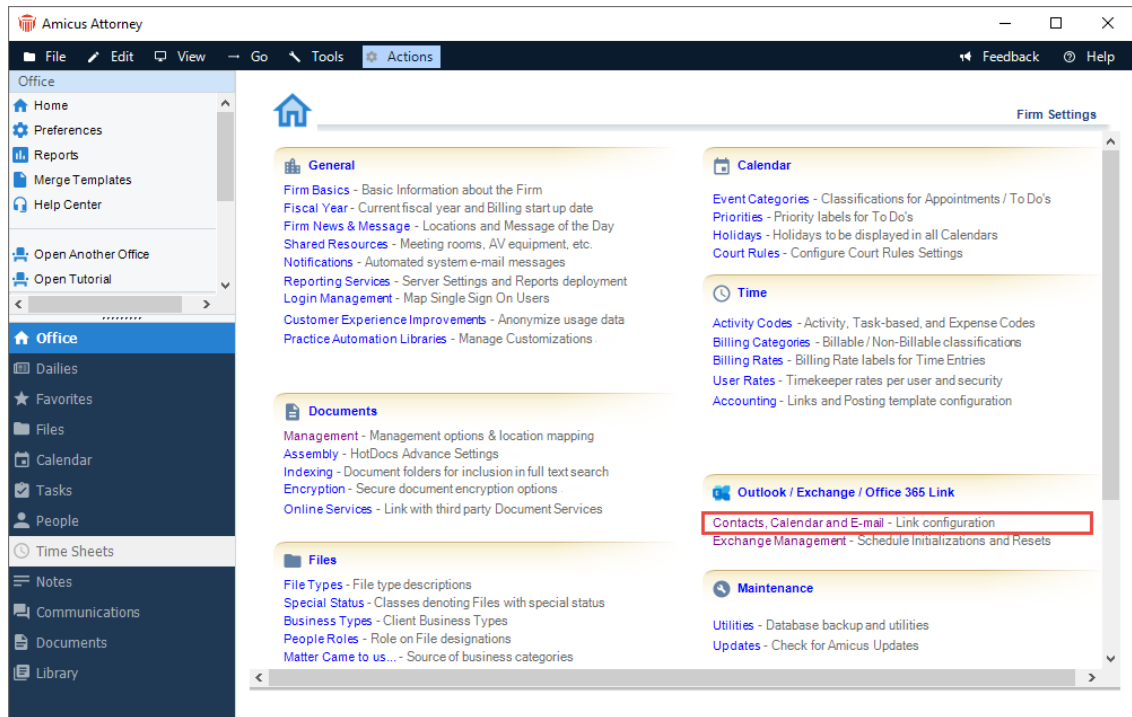


6. Click **copy password to clipboard** so you don't have to memorize the password.
7. Go to the **Amicus app** and enter or paste the App Password when you are prompted.

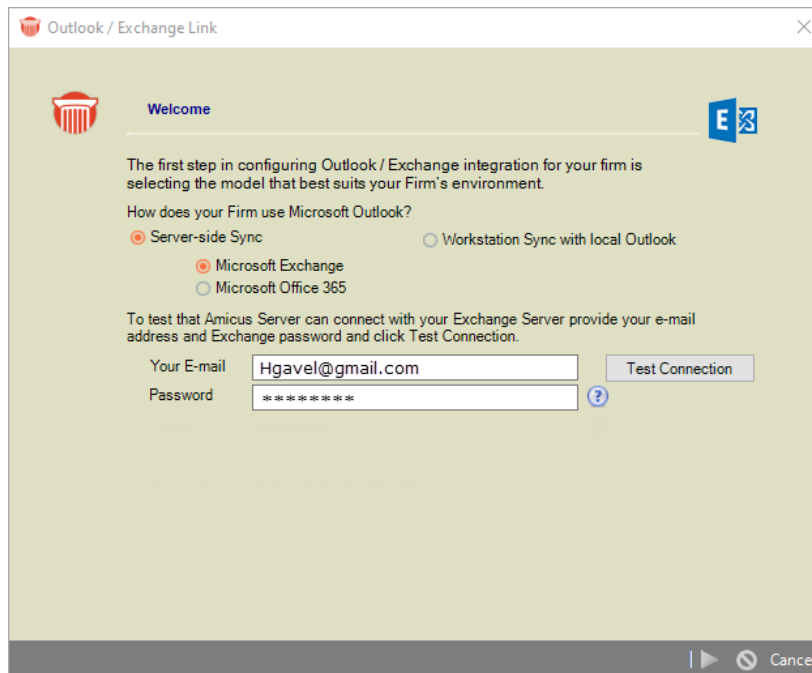
Using your App Password in Amicus Attorney

You will only need to do these steps once to update your Firm Settings.

1. Log into Amicus Attorney, select **Office > Firm Settings** from the left navigation pane.



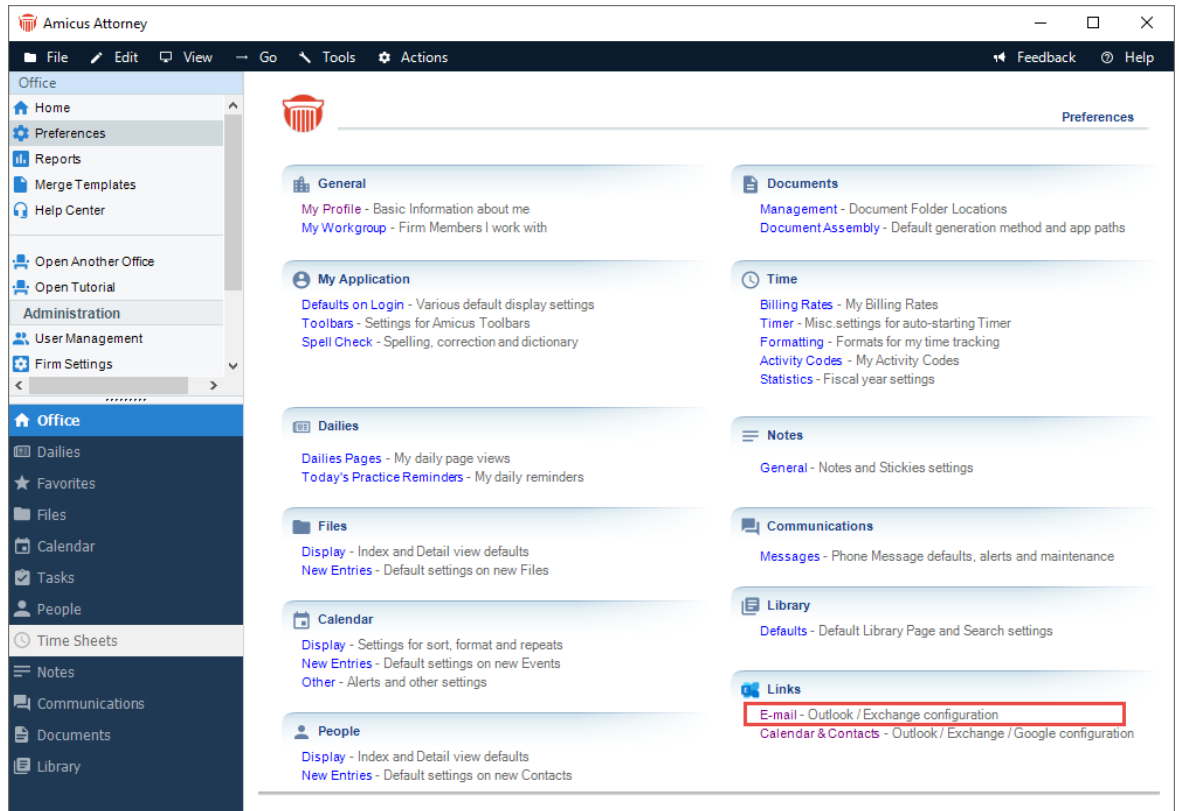
2. Select **Contacts, Calendar and E-mail** under the **Outlook / Exchange Link** tab to display the Outlook / Exchange Link dialog. Click **Configure**.



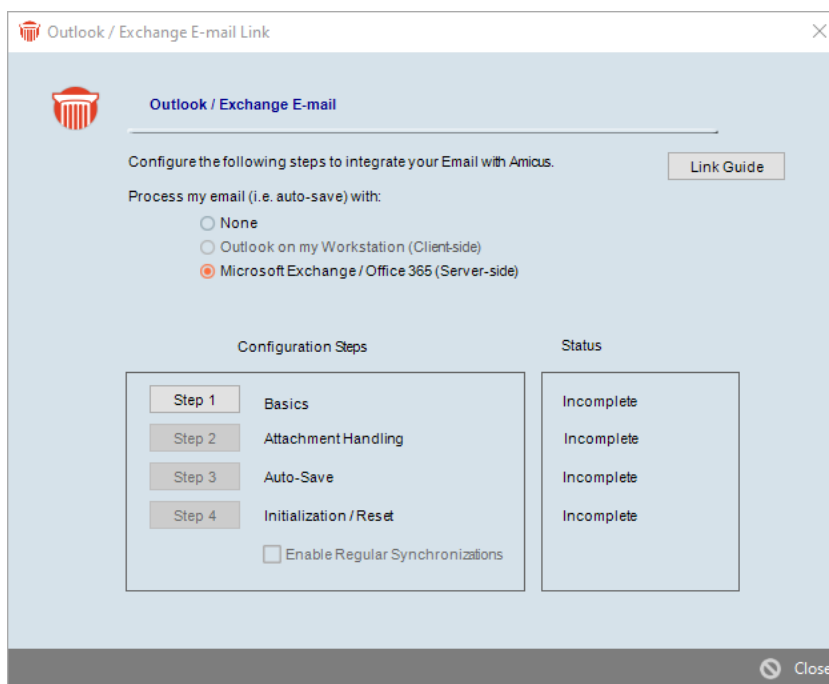
3. Enter the App Password in the **Password** field.

Updating your Preferences in the Exchange Settings dialog.

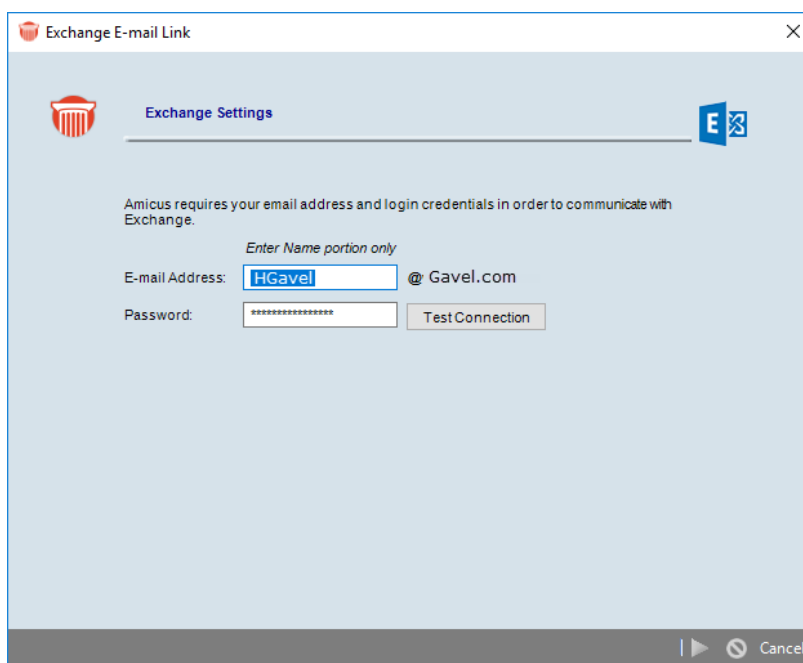
1. To access the **Exchange Settings** dialog, select **Office > Preferences** from the left navigation pane to display the **Preferences** screen.



2. Select **Email – Outlook Exchange configuration** under the **Links** tab to display the **Outlook / Exchange E-mail** dialog.



3. Choose the **Microsoft Exchange (Server-side)** radio button under **Process my email with**, and Click **Step 1** to display the **Exchange Settings** dialog.

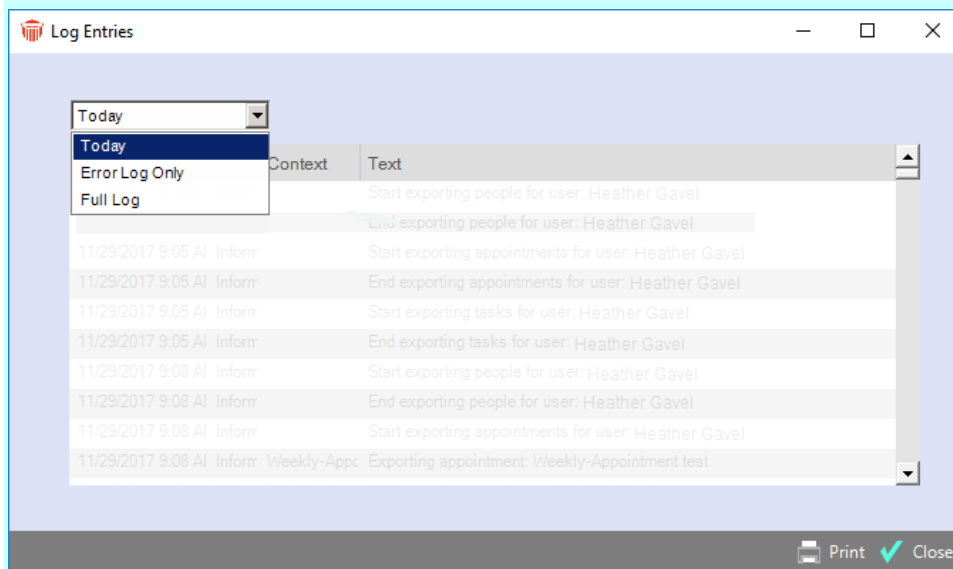


4. Enter the App Password in the **Password** field and click the **Next** arrow in the footer.

Troubleshooting

EXCHANGE: E-mail Link Log

To view a history of your Link initialization and synchronization processes, including any errors encountered, choose Outlook Email > Show Log on the Actions menu in the Communications module. There are 3 views of the Log: Today, Error Log Only, and Full Log.



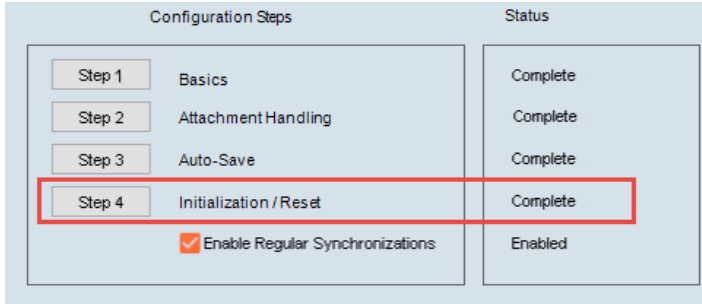
A text version of the full Log listing all users is available directly on the Amicus Server (`AmicusExchangeSync_Date.log`). In the Windows Start Menu, choose Amicus > (Amicus Attorney Tools >) Server Logs.

Resetting the Link

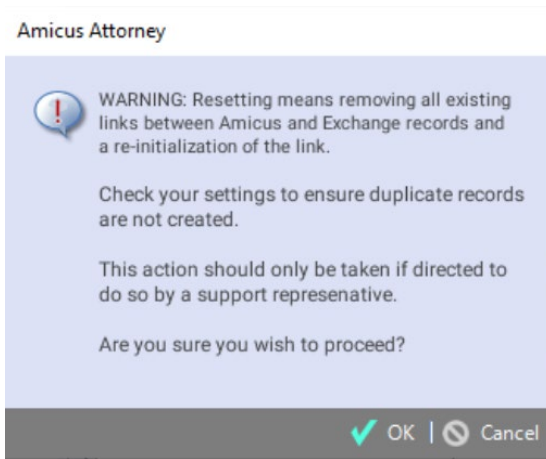
If a Firm Member has changed their Preferences, to auto-save e-mail to/from additional Contacts, or from an earlier start date (earlier than when the Link was initialized), resetting the Link will process the relevant unsaved e-mail.

This will clear the links between the records in the two applications and re-initialize the Link. This can be a lengthy process and should only be done under the direction of a member of the Support Team.

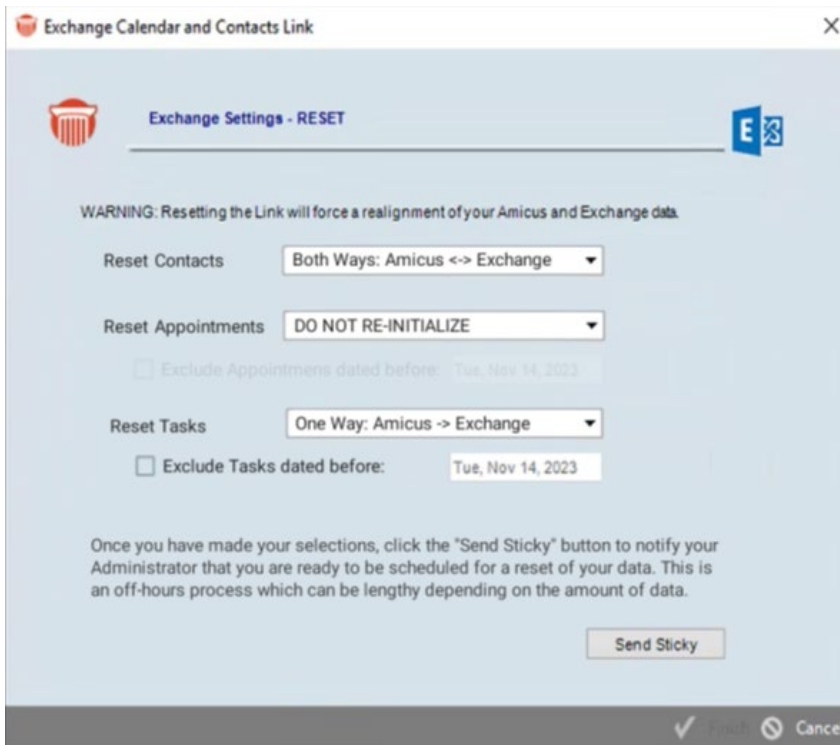
Go to Step 4 (Initialization/Reset) in the Wizard.



A strong Warning appears making it clear what is being done as some users may not understand the ramifications of constant reinitializations.



Click **OK** to proceed. The **Exchange Settings - Reset** dialog appears.



The default option that appears in the **Reset Contacts** and **Reset Appointments** fields is “DO NOT RE-INITIALIZE” so the user needs to choose exactly what they want to reset.

The drop-down list also contains options to reset One way Amicus-> Exchange and One way Exchange->Amicus.

Once a selection has been made click **Send Sticky** to notify your Administrator that you are ready to be scheduled for a reset of your data.



NOTE: The Reset process may be lengthy depending on the number of records created and synchronized. We recommend that you avoid performing a Reset during the period when Firm Daily Checks occur, which is shortly after midnight.

Other Important Information

See the *Amicus Product Bulletin* provided in the Support > Bulletins section of our website, at <http://abacusnext.com/support/bulletin>

Ensure that the Windows Time Zone and Date/Time settings on all Workstations match those on the

Appendix A – Upgrade to Advanced Authentication (OAuth) for Office 365

As of October 2022, Microsoft is retiring support for Basic Authentication for Office 365.

This could impact Amicus Attorney users synchronizing with Office 365 for Amicus Contact, Calendar and/or Email integration capabilities if they have not made the move to Advanced Authentication.

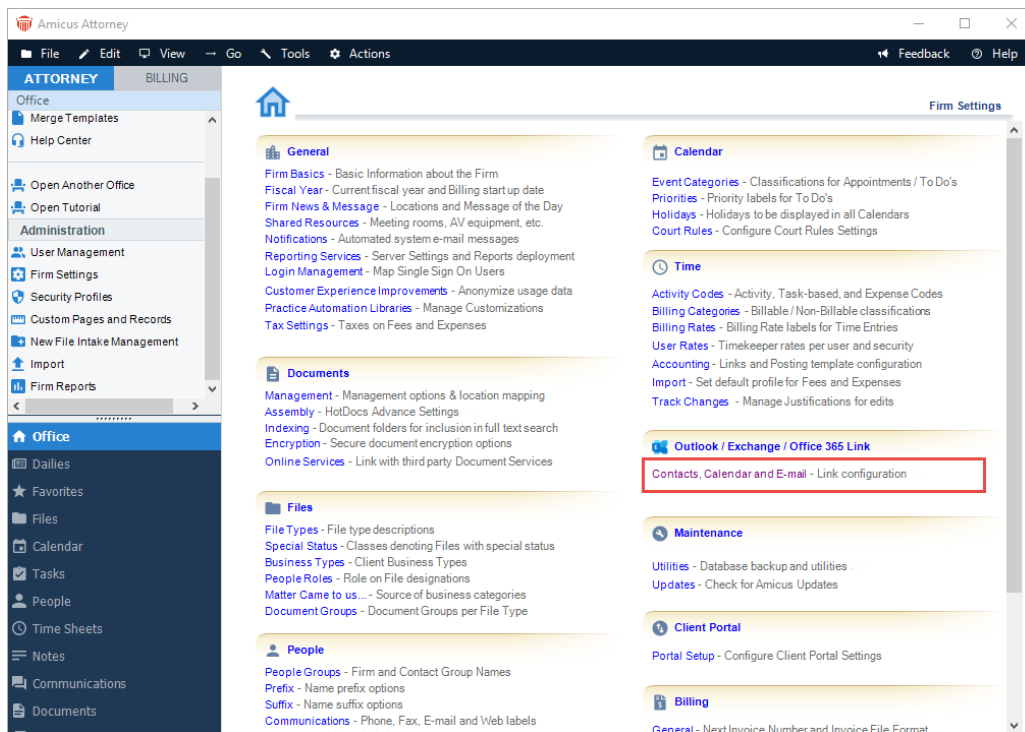
Firms who do not use Office 365 will not have to make any changes.

To apply the Advanced settings firms must be on Amicus Attorney 20.7 or higher.

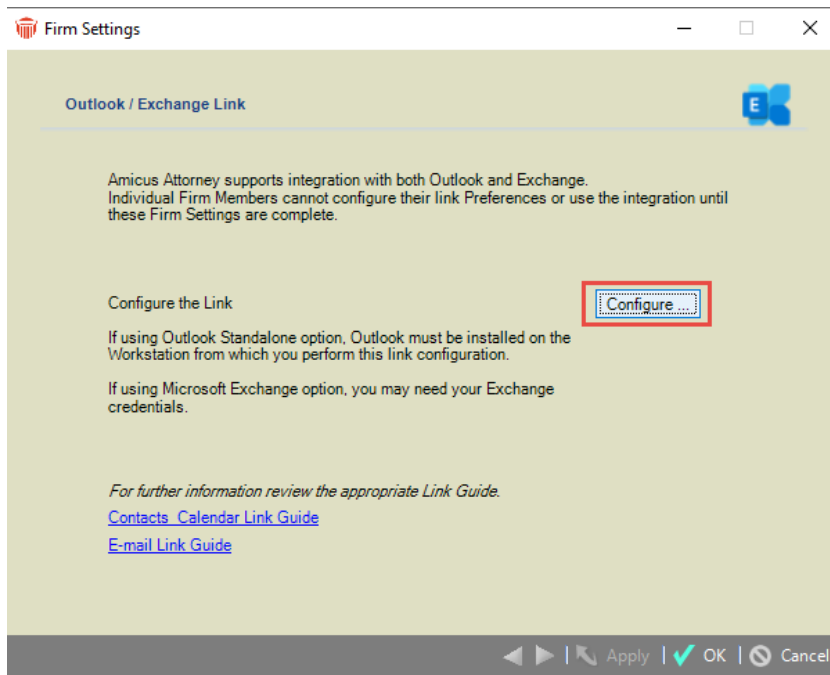
Administrators

The change must be initiated by a single Firm Administrator in the Firm Settings. Firms with multiple administrators should only perform this action once.

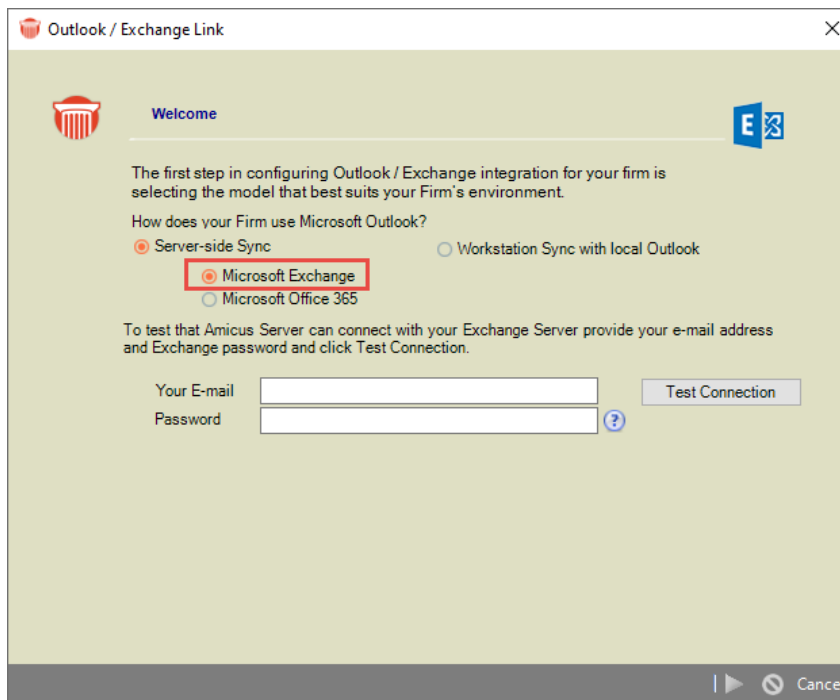
1. To adjust the configuration settings, go to **Firm Settings**, then select **Contacts, Calendar and E-mail** under the **Outlook / Exchange / Office 365 Link** section.



2. The **Outlook / Exchange Link** window displays.



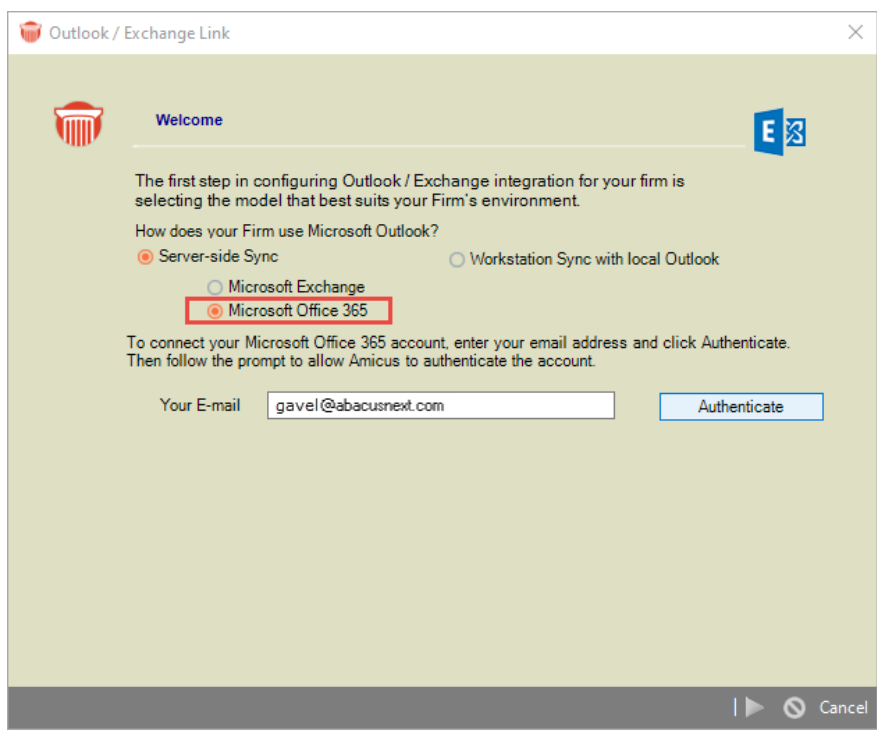
3. Click **Configure** to display the **Welcome** screen.



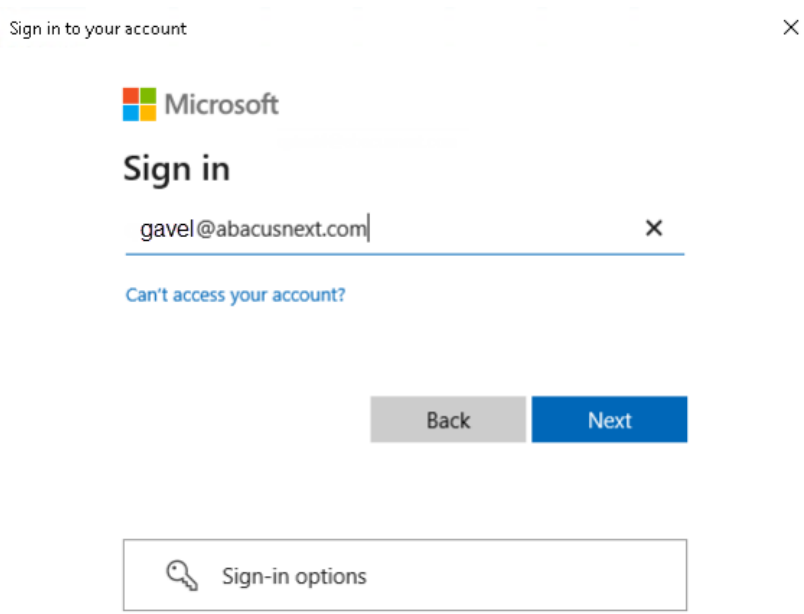
4. If the **Microsoft Exchange** radio button is selected under Server-side Sync, select **Microsoft Office 365**. The lower part of the screen changes.



Note: If the Microsoft Office 365 option is already selected, then no further action is required.




5. The original Administrator's email address will be displayed in **Your E-mail** field.
6. Click the **Authenticate** button to display the **Microsoft** login screen, then enter your email in the **Sign in** field.



7. Click **Next** and enter your password in the field provided.

Sign in to your account ×


← qatest4@abacusnext.com

Enter password

.....|



[Forgot my password](#)

Sign in

Welcome to AbacusNext

8. Click **Sign in** to return to the **Welcome** screen. A message now displays at the bottom stating that the Test Connection was successful.

Outlook / Exchange Link ×

Welcome

The first step in configuring Outlook / Exchange integration for your firm is selecting the model that best suits your Firm's environment.

How does your Firm use Microsoft Outlook?

Server-side Sync Workstation Sync with local Outlook

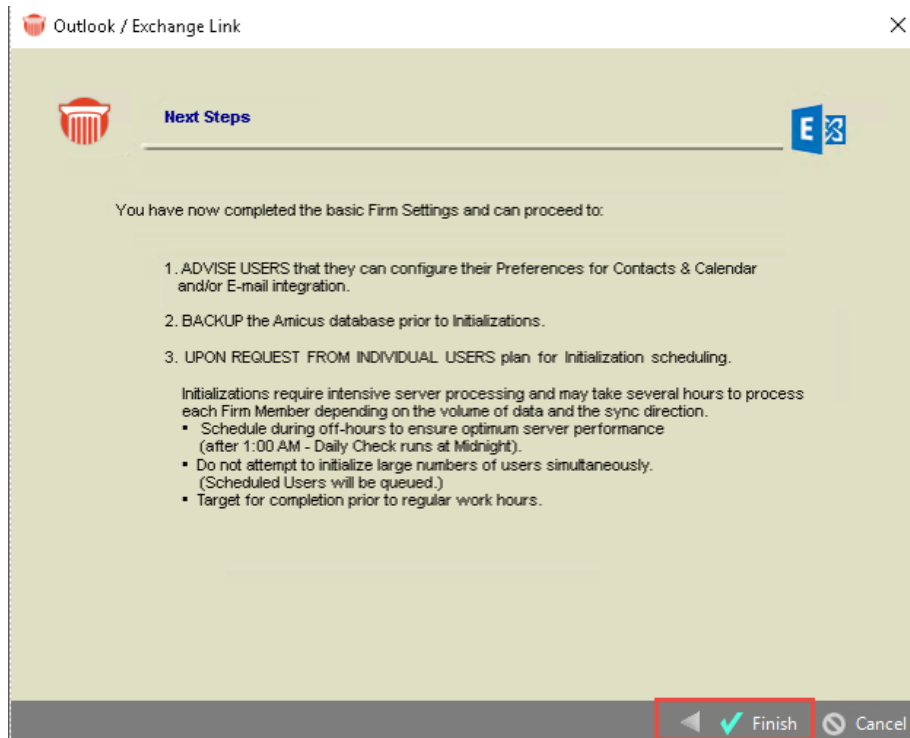
Microsoft Exchange
 Microsoft Office 365

To connect your Microsoft Office 365 account, enter your email address and click Authenticate. Then follow the prompt to allow Amicus to authenticate the account.

Your E-mail

Test connection was successful.

9. Click the **Next** arrow to display a new screen and click the **Next** arrow again to display the **Next Steps** screen.

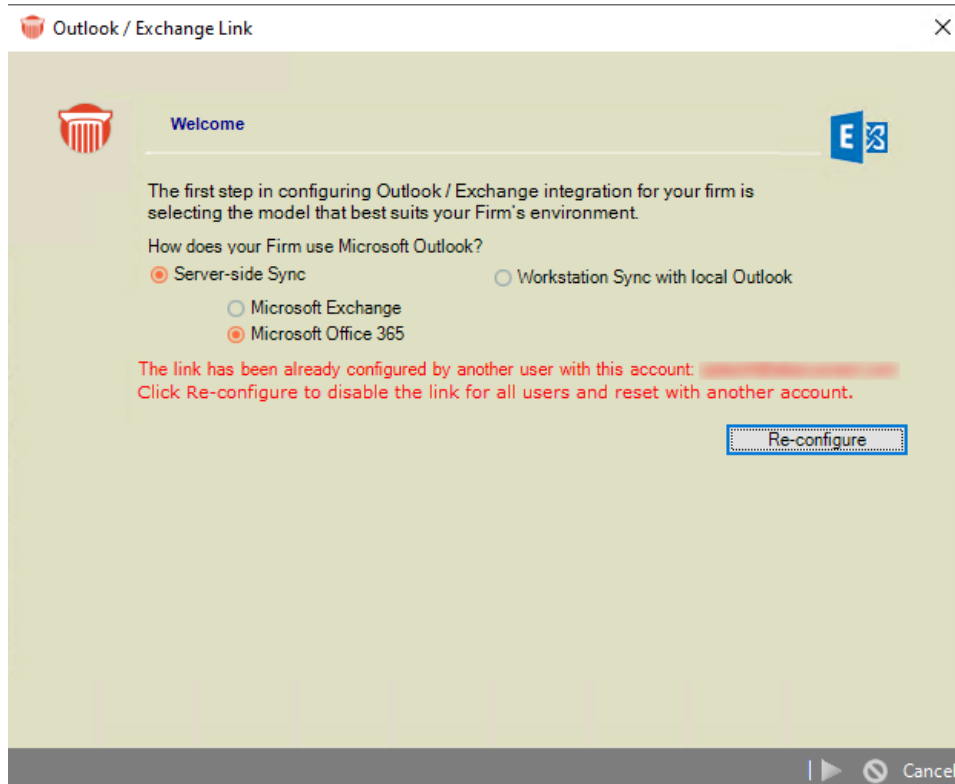


10. Click **Finish** to complete the process.

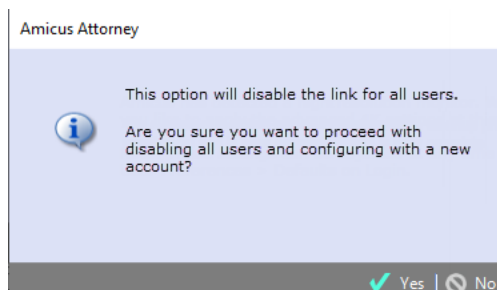
When Office 365 and Exchange links have already been configured

When a Firm Administrator in a firm with multiple administrators begins the process of configuring the Office 365 and Exchange links a strong warning message will display if the Office 365 and Exchange links have already been configured by another Administrator. This lets them know that the process has already been completed, and warns them that if they continue with the process all users in the firm will be disabled.

To view the warning message select **Contacts, Calendar and Email - Link configuration** under the **Outlook / Exchange / Office 365 Link** in **Firm Settings**, then click **Configure** to display the **Welcome** screen with a strong warning message. The **Configure** button is also replaced by a **Re-configure** button.



If you choose to click **Re-configure**, a prompt displays informing you that if you continue with the reconfiguration the link will be disabled for all users.



If you still wish to configure a new account, click **Yes** to proceed or **No** to return to the **Welcome** screen without making any changes.



by **C^RET**

CARET
Phone: 800-472-2289
416-977-6633

www.getcaret.com

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April 2024