LawToolBox365

Matter-Based Deadlines Inside Outlook

## Ingram Micro Cloud Services

# FAQ - Resellers

| Service Description |
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| LawToolBox.com Inc., an all-in-one court rules provider and deadline management system provider, offers LawToolBox365 bundled with Microsoft Office 365 as an Outlook add-in. LawToolBox365 for Office 2013 and Office 2016 empowers legal professionals to calculate deadlines in state and federal court in 50 states, and manage deadlines for their matters from beginning to end without ever leaving their Outlook Inbox. Missed deadlines are the number one cause of malpractice claims against attorneys. LawToolBox365 gives law firms that use or upgrade to Office 365 powerful deadline management tools to manage this risk. |

| Question? | Answer |
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| Q 1 – I work with a lot of law firms that are interested in upgrading to Office 365 and which also have a critical business need to manage deadlines. How do I sign up to resell Office 365 and LawToolBox365, and how will I generate revenue for myself? | A - LawToolBox365 is distributed through the Ingram Micro Marketplace. Ingram Micro is one of the biggest distributors in the world, and they account for 2/3 of Microsoft products distributed in the US and 100% outside the US.<br><br>If you want to resell LawToolBox365 bundled with Office 365 for Legal, and generate an ongoing revenue, you can SIGN UP to become an Ingram Micro Reseller. |
| Q 2 – I have some clients or prospects that could be interested in purchasing LawToolBox365, where are some sample emails I could forward or customize to a law firm or legal department so they can learn more about LawToolBox365 and whether it might be a good fit for them? | A – Click here to find drafts of emails and other marketing materials you can use to explain the value proposition for LawToolBox365 to law firms and legal departments you think might be interested in learning more about LawToolBox365 |
| Q 3 – I am a reseller. How do I purchase LawToolBox365 for my clients? | A – Sign up to become an Ingram Micro reseller. Then access the market and navigate to the legal vertical. You can contact Ingram directly if you run into any issues:<br><br>Monday-Friday 8 a.m. to 8 p.m. EST<br>(800) 616-4665<br>Select option 1, then option 2<br><br>Once you set up your Ingram account, you will be able to provision Office 365 and LawToolBox365 accounts for your clients from your Ingram control panel. Ingram will pay you a recurring commission for the end-user law firms you sign up pursuant to the terms of your agreement with them. |
| Q 4 – What are the Technical Requirements for installing LawToolBox365 as an add-in? | A - LawToolBox365 works with Outlook 365, Outlook 2013, and Outlook 2016. Because Outlook 2016 has more robust features that OWA or Outlook 2013, the app will look slightly differently there and have some additional features. When the end-user upgrades from Outlook 2013 to Outlook 2016, these new features will automatically appear. |
| Q 5 – How do I set up and install LawToolBox365 as an Add-in for Outlook? | A - Add the LawToolBox365 Add-in to an Outlook Mailbox (LawToolBox365 Add-in for Outlook is authenticated to an Office 365 user account through single sign-on “SSO”). |

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| | 1) From inside a user's Outlook Web App > Choose Settings > Manage add-ins, o top right corner of the page, or<br><br>2) From inside a user's Outlook Inbox: File > Manage Add-ins > and click on "+" ><br><br>Then, select "Add from Link" and paste the link provided in the Ingram portal; or, select "Add from the Office Store" > search for LawToolBox365 and click "Next" |
| Q 6 – How do I to create an Outlook Rule so that when deadlines are added to calendars the appointment invites don't clutter up my Inbox? | A – There are 2 ways to create an Outlook rule so that Calendar invites are automatically handled: (1) Creating an Outlook Rule one Mailbox at a time as described here, or (2) Creating an Outlook Rule (server side) one time in exchange server using Powershell (email support@lawtoolbox.com to request batch file template). |
| Q 7 - How do I Add and Remove users? What if I need more licenses? | A - When you purchase a new subscription you will identify the number of licenses you are purchasing (e.g., if you buy 5 licenses you can only add 5 users). If the law firm has grown and you want to now add more users than are in your initial license, you will need to update your subscription. You can log into your Ingram portal, and then add to the number of licenses you have purchased (new users will be added at the same per user rate as the initial round of users was eligible for). |
| Q 8 - How do I create a New Firm for a new LawToolBox365 account? | A - When you create a new subscription for a new client, behind the scenes the Ingram marketplace will automatically provision a LawToolBox account for the firm. It will all be done automatically. |
| Q 9 - How do I add new Users to a new LawToolBox365 account? | A - When you purchase a new subscription you will identify the number of licenses you are purchasing. You can log into your Ingram portal, and then add new users from the Ingram portal until you try to exceed the number of licenses you have purchased (e.g., if you buy 5 licenses you can only add 5 users). If someone leaves the firm and you want to replace them with a new user, you will have to first disable the old user (to free up a license) and then add the new user. |
| Q 10 - How does the end-user law firm or legal department set up their FIRST matter? | A - You can set up a new matter either by (1) clicking on the pancake menu and selecting "Create New Matter", or by (2) clicking on the "Calculate Deadlines" button in the Outlook ribbon and entering the matter name. If the matter has already been set up it will automatically appear in a "auto complete" menu, if it is a new matter the menu just enter the information and submit).<br><br>To set up a new matter you will need to assign a short matter name, the state in which it is pending, and the rule-set or venue. Other information is optional like: matter number, client name, client number, insurance claim number, the public case number, the URL to public case number, and a 3d party unique identifier to tie the matter to another case management system. |
| Q 11 - How does the end-user law firm or legal department calculate deadlines from a PACER email? | A - You have to have the PACER notification in focus in your Outlook window pane. Then you can read the basic matter contents of the PACER notification by clicking on the "Calculate Deadlines" button in the Outlook ribbon and entering the matter name. |
| Q 12 - How does the end-user law firm or legal department calculate or re-calculate deadlines for existing matter? | A - To calculate new deadlines (or re-calculate deadlines) for matters, you can click on "Calculate Deadlines in the Outlook ribbon and in the "case nickname" field start typing the first few letters of the name you gave the matter, the auto complete function will locate the case and fill in the rest of the fields.<br><br>If you select the SAME trigger date as you have used before in the same matter, the prior calculations based off that trigger date will be overwritten with the the new calculations. |

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| | If you select a NEW trigger date then the new calculations will be added to the matters comprehensive deadline list. |
| Q 13 – How does the end-user law firm or legal department share deadlines internally or outside their firm? | A - When you finish calculating new deadlines you will end up on the "share deadlines" page. For an existing matter, you can click on the "Share Deadlines" button in the Outlook ribbon, or you can select "Share Deadlines" on the pancake menu.<br><br>Select the check boxes on the deadlines you want to share, then click on the "Share" button. Fill in the email addresses of the users you want to share the deadlines too, then select the appropriate time zones and calendar, and submit your request. |
| Q 14 - How does the end-user law firm or legal department insert deadline chart into new email? | A - When you start composing a new email, new buttons will appear in the Outlook ribbon. Click on "Insert Deadlines" and the task pane will open. Select the matter you want deadlines for, and when the deadline chart loads, use check boxes to select the deadlines you want and then click "Insert Deadlines." |
| Q 15 - How does the end-user law firm or legal department insert email template into new email? | A - When you start composing a new email, new buttons will appear in the Outlook ribbon. Click on "Email Template" and the task pane will open. Select the library you want, and the templates will load. Select the template you want and then click "Insert Template." |