

LawToolBox

365 USER MANUAL

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LawToolBox for Microsoft Outlook & Teams

Rule No. 1: Outlook Inbox Rule (repeat for all users)

LawToolBox Rules The rule automatically moves deadlines (e.g.: all day events) out of the Outlook inbox. 95% of items LawToolBox generates are deadlines. **However**, if an attorney also wants to automatically move calendar invites scheduled for a specific time of day (e.g., from 9am-12pm) to same folder replace **LTB-allday** with **LTBUID** for Rule#1. Most attorneys prefer our default settings and prefer to click “I Accept” to events scheduled at a specific time of day so that the deadlines appear as bold on the calendar and the attorney shows as busy (instead of tentative and grayed out) during that time.

Outlook Desktop

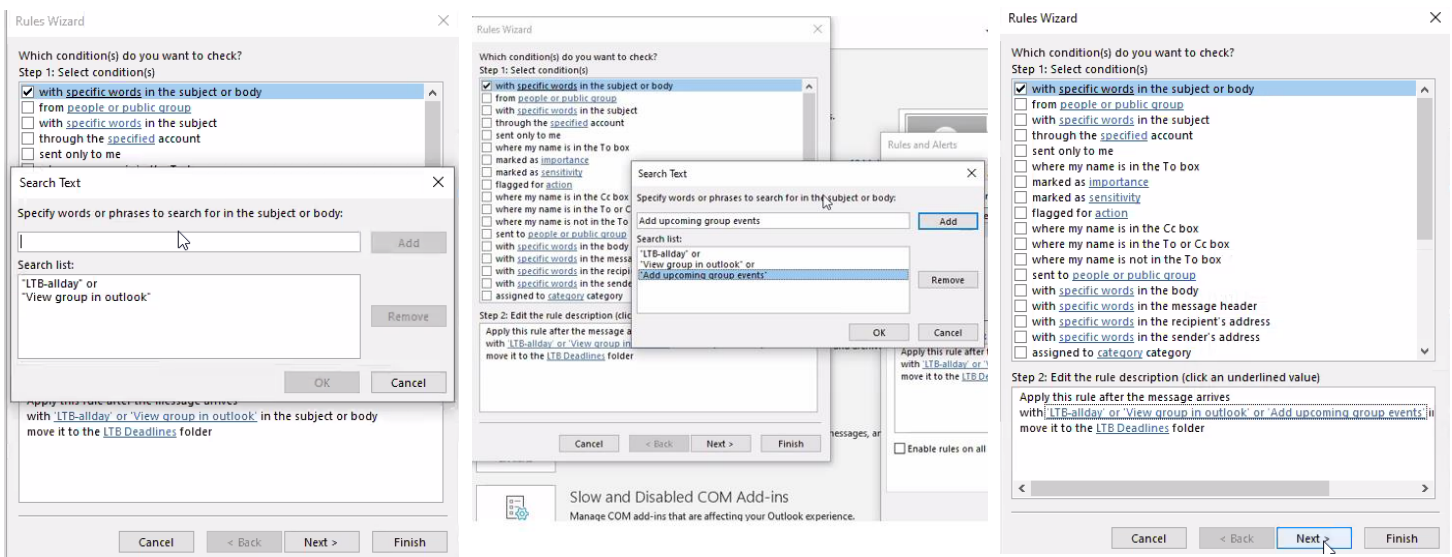
A user includes anyone sending, receiving deadlines, reports, documents using LawToolBox Move any messages containing these words in the subject or body to a new folder you create called “LTB Deadlines”. Please note that search teams for Outlook Rules are cap sensitive

Outlook Rules:

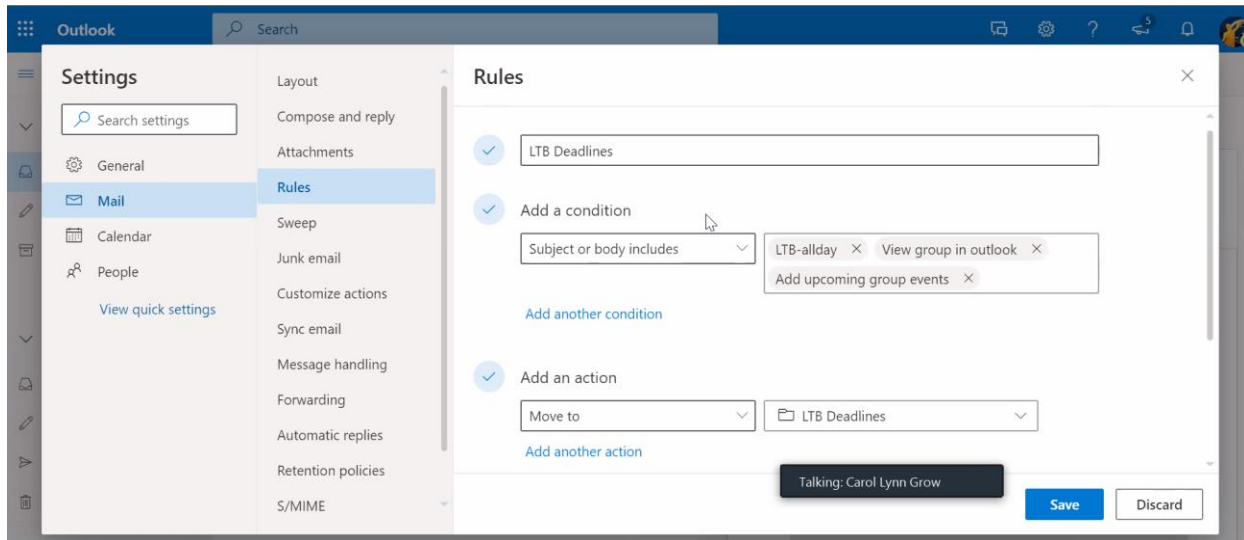
- LTB-allday
- Add upcoming group events
- View group in outlook
- added to a team in Microsoft Teams

RULES WIZARD View:

Go to File > Manage Rules and Alerts > Create New Rule



Outlook OWA



Outlook MAC

Right Click on Inbox
Create New Folder – LTB Deadlines
Click on Rules-In the Toolbar
Edit Rules
Click +
LTB Deadlines
Change “From” to “Subject or Body”
Search Term – “LTB-allday” “View group” “Add upcoming group events”
Move to Folder – LTB Deadlines

Rule No. 2: Outlook Inbox Rule (for primary users)

Move any messages containing these words in the subject or body to a your new folder called “LTBUSER”

This rule enables one designated LTB expert per law firm or legal department to receive notification in a folder in Outlook Inbox that can be referred to for the dates that users have been added or removed form cases

FAQ - Your LawToolBox Account

<p>OUTLOOK FAQ - Links</p> <p>Sign in to LawToolBox with Office 365 Credentials</p> <p>Setting Up a New Matter in Office 365</p> <p>Calculate Deadlines for an Office 365 Matter</p> <p>Recalculate Deadlines when Trials or Depos move</p> <p>Adding Case Specific Deadlines and Appointments</p> <p>Managing General Matters for Basic Calendaring</p> <p>Adding and Removing Users from Matters</p> <p>Sharing Deadlines w Client, Co-Counsel, and Experts</p> <p>History of Changes – who edited what deadline and when</p> <p>Deadline Analytics</p> <p>Deadline Reminders</p> <p>Robust Reporting Across Firm, Group, User and Matter</p> <p>Use LawToolBox on a Phone or Tablet</p> <p>How to Add Contacts to a Matter</p> <p>Closing Matters</p>	<p>TEAMS FAQ - Links</p> <p>Communicate, Chat & Collaborate in Microsoft Teams</p> <p>NEW</p> <p>Setting up a New Matter in Outlook or Teams</p> <p>File & Document Management in Microsoft Teams</p> <p>NEW</p> <p>Attaching a NEW matter to EXISTING group or team</p> <p>Calculate deadlines from either Outlook or Teams</p> <p>Configure your Litigation or Transaction Law Hub in Teams</p> <p>Configure Channels, Files and Tabs for a matter</p> <p>Have meetings with teammates, clients, experts</p> <p>Add people outside your organization as Guests</p> <p>How to Add Contacts to a Matter</p> <p>Use LawToolBox on a Phone or Tablet</p>
<p>FAQ LINKS – IT Links</p> <p>Configuring Teams and enabling the LawToolBox app</p>	<p>MORE FREQUENTLY ASKED QUESTIONS</p> <p>Learn More FAQ</p>
<p>TRAINING MATERIALS</p> <p>Video Library</p>	<p>ONLINE WEBINARS</p> <p>RSVP to attend training webinars</p>
<p>LAWTOOLBOX SUPPORT DESK</p> <p>Toll Free: 888-958-6657 Office: 303-759-3572 Email: support@lawtoolbox.com</p> <p>Our customer service group is available 8:30 a.m. - 5 p.m. Mountain Standard (M-F)</p>	