
ARROW365 FAQ

EMPOWERING LAW PRACTICES WITH MICROSOFT 365

- 1. What is Arrow365?** Arrow365 is an API that integrates with Microsoft 365, provisioning and templating SharePoint sites (known as Matter sites) to create a customizable case management system tailored to law practices. In addition to a Matter site, a Microsoft Team with a General channel is also deployed, which contains additional tabs for quick access to Matter emails, calendar, tasks, files, and more. This gives your practice more flexibility in the Microsoft 365 ecosystem.
- 2. How does Arrow365 enhance Microsoft 365?** Arrow365 enhances the Microsoft 365 user experience by automating workflows and bridging together apps like Outlook, OneDrive, OneNote, Planner, and Lists, with SharePoint and Teams as the hub to create a truly customizable case management system. While Arrow365 provisions and configures your Matter sites for case management, it's important to note that Arrow365 does not change how Microsoft 365 apps feel, look, or function.
- 3. What makes Arrow365 unique?** Unlike traditional case management systems, Arrow365 empowers law practices to customize their own system, leveraging the tools and apps they already use within Microsoft 365. Instead of putting you in a box, we'll empower your practice to build your own box.
- 4. Who can benefit from Arrow365?** Any law practice looking to streamline their case management processes, improve efficiency, reduce overhead costs, and fully utilize their existing Microsoft 365 subscription. You have it. Use it!
- 5. Do I need technical expertise to use Arrow365?** No, Arrow365's automation is designed to be user-friendly and comes with support and training from Misty Murray, a seasoned legal professional and Microsoft 365 trainer. However, we will work with your IT, if any, to implement this solution.
- 6. How do I know which Arrow365 template is right for my practice?** When you become part of the Arrow365 family, your practice will get all three templates. During a design meeting with Misty Murray, you'll choose one of the Arrow365 templates as your 'default' template. Your default template will deploy with your default folder structure, Planner structure, and OneNote Notebook structure.
- 7. Do you offer custom SharePoint templates?** Yes, but not usually within the first six months. This is because we want to make sure you're familiar with how your law firm will function day-to-day in the Microsoft 365 ecosystem. A custom SharePoint template is a separate service and requires a separate Service Agreement for the scope of work. We would assist in designing the template and create the code for the new SharePoint template design. The new template would get integrated

into your Arrow365 services and your new SharePoint template would become your new ‘default’ template for Matter sites.

- 8. How does Arrow365 handle contacts?** We developed a Global Contacts management system using SharePoint, Lists, and a little automation magic. When Global Contacts are associated with a Matter site, the Matter site will update. If the contact exists on multiple Matter sites, the contact will update on all Matter sites. Each Matter site deploys with a Contacts list, which is also published on the Home page of the Matter site making it highly accessible to the entire Matter site team. We find a lot of firms using Arrow365 use our Global Contacts solution as one place to perform conflicts checks.
- 9. Can I modify Matter sites after they are created?** Absolutely, the Matter sites are all yours to keep and customize! In fact, Misty Murray’s training will empower your practice with the information needed to make further modifications and customizations as you see fit.
- 10. Is Microsoft 365 suitable for remote work?** Absolutely. Microsoft 365 apps are available 24/7 across multiple devices, including tablets and smartphones, making the Microsoft 365 ecosystem perfect for remote case management.
- 11. What automations does Arrow365 provide?** Arrow365 includes automations for creating and templating SharePoint sites and Microsoft Teams channels. We also have automations for Critical Deadlines Reporting, Indexing, Contacts Management, and more, to streamline legal operations. We listen to our users and continue to create automations that drive productivity and boost efficiency.
- 12. Can you tell me more about Arrow365’s Indexing feature?** Certainly. We want you to organize to optimize! Here’s how it works: when files are saved in the Matter site library (powered by OneDrive), the name of the file and the hyperlink to the file are indexed in the corresponding index. For example, if you save a pleading in the Pleadings folder, the name and hyperlink to that pleading are added to the Pleading Index. Our General Litigation template comes with several indexes for tracking case data:
 - **Client Docs Index**
 - **Records Index**
 - **Liens Index**
 - **Pleadings Index**
 - **Orders Index**
 - **Plaintiff Document Production Index**
 - **Defendant Document Production Index**
 - **Written Discovery Index**
 - **Depositions Index**
 - **Damages Tracker Index**
- 13. How secure is my law firm’s data?** Microsoft 365 uses encryption to protect your law firm’s data, but the level of security depends on how you use the platform, and the security controls you implement. We recommend leveraging MFA or Conditional Access Policies. Additionally, Microsoft uses encryption protocols like Transport Layer Security/Secure Sockets Layer (TLS/SSL), Internet Protocol Security (IPSec), and Advanced Encryption Standard (AES). Additionally, Microsoft 365 is verified to meet the requirements specified in ISO 27001, European Union (EU) Model Clauses, the Health Insurance Portability and Accountability Act Business

Associate Agreement (HIPAA BAA), and the Federal Information Security Management Act (FISMA), just to name a few.

14. **What support does Arrow365 offer?** We provide comprehensive support for Arrow365 automation and services, including troubleshooting, regular updates, and personalized training sessions.
15. **Are there any additional costs after the initial setup fee for Arrow365?** Yes, after the initial setup fee, there is a renewal payment of \$500 every six months for continued use, automation, support, and training. Your first renewal payment is due six (6) months after Arrow365 has been implemented. This means your case management system costs \$1,000 per year regardless of user numbers.
16. **How does Arrow365 integrate with Microsoft 365?** Arrow365 integrates seamlessly through a business-to-business (B2B) connection in Microsoft Azure.
17. **What happens to my data if I do not renew my Arrow365 Plan?** Absolutely nothing. You keep the Matter sites and all data contained in them. If you purchased the Arrow365 Premium Plan, you even get to keep the Microsoft 365 Training Center and all video tutorials.
18. **What will I lose if I choose not to renew my Arrow365 Plan?** You will lose the ability to create SharePoint sites from template, as well as lose any automations that Arrow365 provided such as automated indexing, Contacts Management, Critical Deadlines Reporting, etc. If you choose not to renew your Arrow365 Plan, we hope that through our training, we've empowered you to take it forward on your own. It's okay if we're the Nanny McPhee of your law firm – here when you need us and gone when you don't. Our goal is to empower the user and assist you in building your practice sustainably.
19. **How will Arrow365 reduce my overhead costs?** Our goal is to get you off of the third-party hamster wheel and empower your law firm with the power of Microsoft 365. More importantly, Arrow365 is charged per Microsoft tenant (subscription), not per user, making it **the most cost-effective case management solution on the market today**. Do you have five offices and 300 users? How much are you paying per seat for case management? Would only paying \$1,000 per year enable you to do more with your practice? We think so, and that's why we do what we do.
20. **How does training work? Are you really going to train all our people?** Yes, Misty Murray will train your team either individually or in a group. In fact, training is the most crucial part of implementing Arrow365 and Microsoft 365 for your law practice. Misty will go through each Microsoft app connected to your Matter sites (SharePoint) and show you the options to execute your unique day-to-day operations, which will help you determine the paths of least resistance for your law firm. When you onboard a new team member, Misty will be there to train them (if needed). All training is scheduled via a self-service booking link, which we provide during the initial setup.
21. **Is there a training hours cap for any Arrow365 Plan?** No, we do not currently have a cap on the number of hours provided for training. Training is available on a first-come-first-serve basis. Training days/hours are Monday through Thursday from 10 am to 4 pm Central Time. On occasion, we will make special accommodations for training outside of the normal training days and hours, if needed.

- 22. Do you do in-person training?** Yes, occasionally. In-person training is available upon request. However, please note that Misty does not usually travel during the months of November through February.
- 23. Are there pre-requisites for implementing Arrow365?** Yes, there are. First, your email **MUST** be hosted by Microsoft Exchange. You cannot have one foot in Google and the other in Microsoft. Second, your Microsoft 365 subscription must have been purchased through Microsoft and not a third-party reseller such as AppRiver or GoDaddy.
- 24. Does Arrow365 have a timekeeping and billing component?** No, it does not. This is because Microsoft 365 doesn't have an app for these functions. For this reason, we have partnered with TimeSolv to provide the most robust timekeeping and billing solution. TimeSolv integrates with Outlook meaning you can turn those emails and events into trackable, billable time without ever leaving Outlook. For more information about TimeSolv, we would recommend going to their site directly. Through our partnership, TimeSolv is offering a 60-day no-obligation trial. Just mention Arrow365.
- 25. Is Arrow365 only offered in the United States, or can law practices in other countries benefit from it as a case management solution?** We support law firms all over the world. The only limitation is that you must operate in English. Microsoft 365 is available globally, which means Arrow365 can be implemented globally. We think it is a wonderful thing that Microsoft 365 has unified us in the applications we use on a day-to-day basis in the Microsoft 365 ecosystem. Because of this, our solution is available to any law practice operating in English who has a Microsoft 365 subscription. We support law firms all over the world.

If you have questions that are not answered here, I encourage you to schedule a consultation.