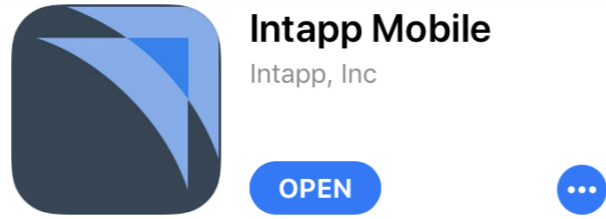


Intapp OnePlace offers an App that allows users to access contact information, client details or any of your firm's data stored in Intapp OnePlace. Create notes and update data on the go and make it instantly available to the rest of your firm. Compatible with iOS and Android mobile devices.

### How to Download the App

1. Open the **App Store**
2. Search for **Intapp Mobile**
3. Select **Open** to download

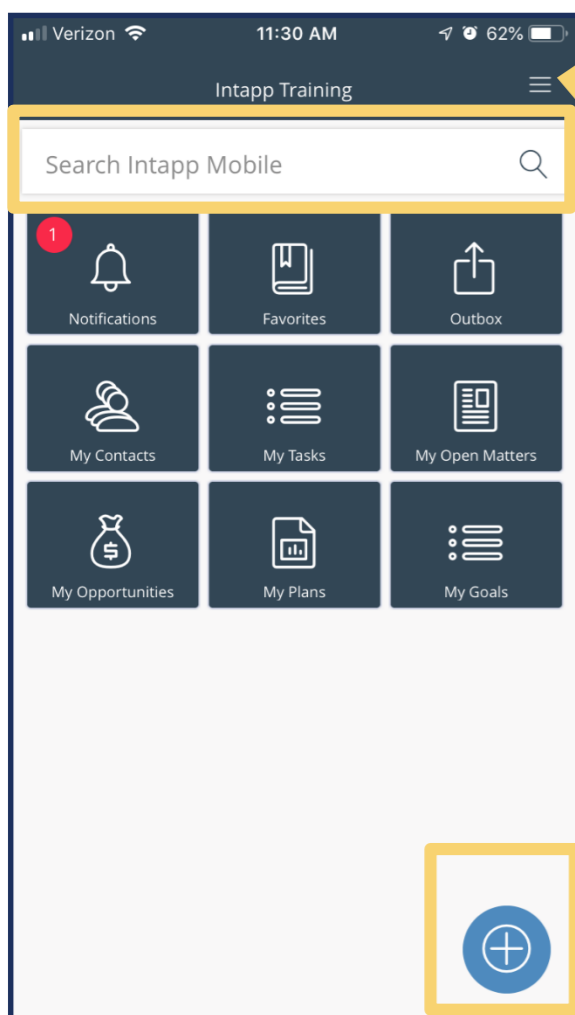


*\*Your login credentials are the same as your Web Portal credentials*

### Best Practice When Adding Objects

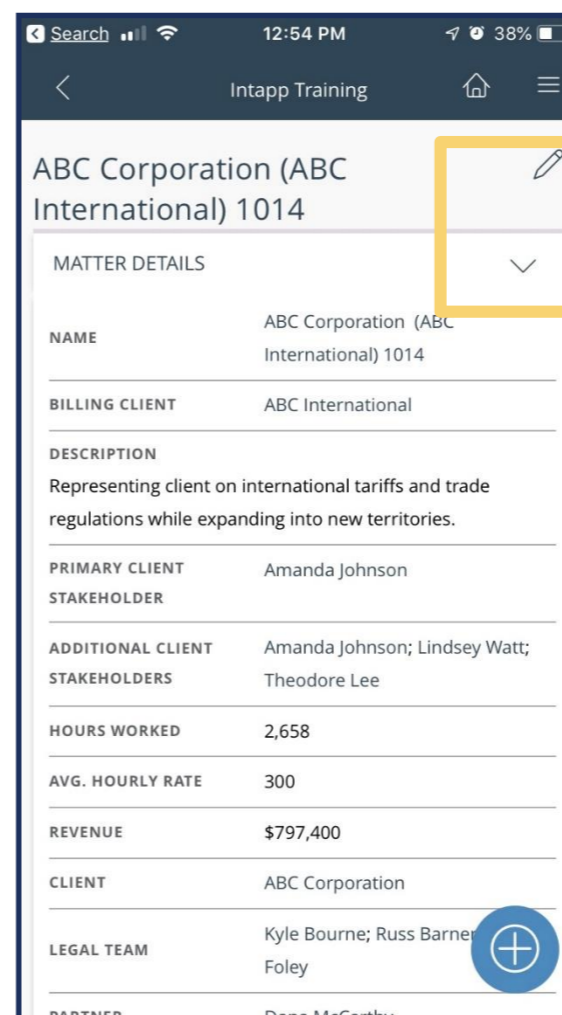
When you are adding objects using the Intapp OnePlace Mobile App's **Add Icon**, first search for the object to which you want to tag the entry to (i.e. the company to which you want to add a contact to), then select the **Add Icon**. This way, the entry form will prepopulate with the tags necessary to associate the entry to that object.

### HOME SCREEN



- Menu**  
Access Settings, Log Out, and various OnePlace pages
- Search**  
Search for contacts, clients, plans, companies, etc.
- Outbox**  
Entries completed while offline will show in **Outbox** until you are connected.
- Homepage Icons**  
Quickly go to Contacts, Tasks, Notifications, etc.
- Add Icon**  
Quickly add objects (i.e. notes and contacts) with the add icon.

### DETAIL SCREEN

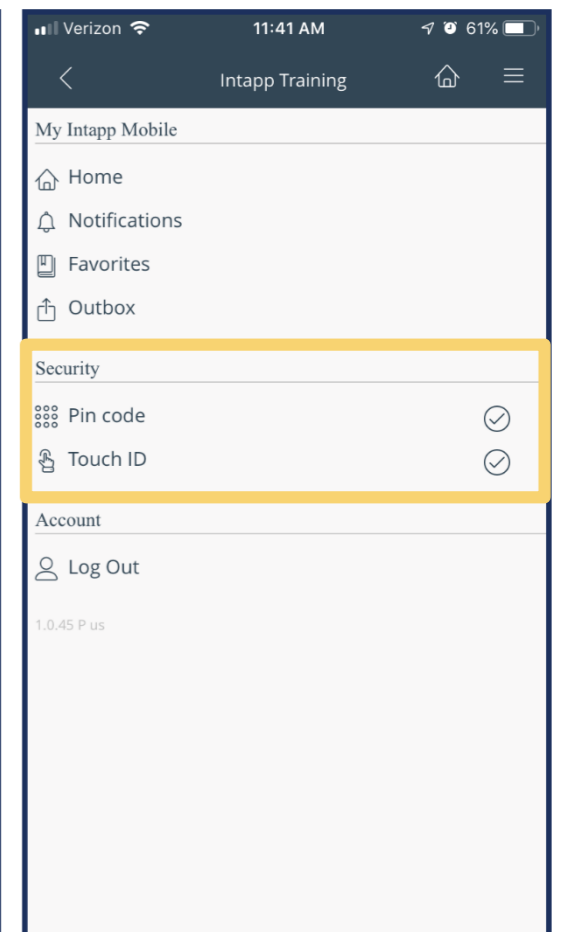
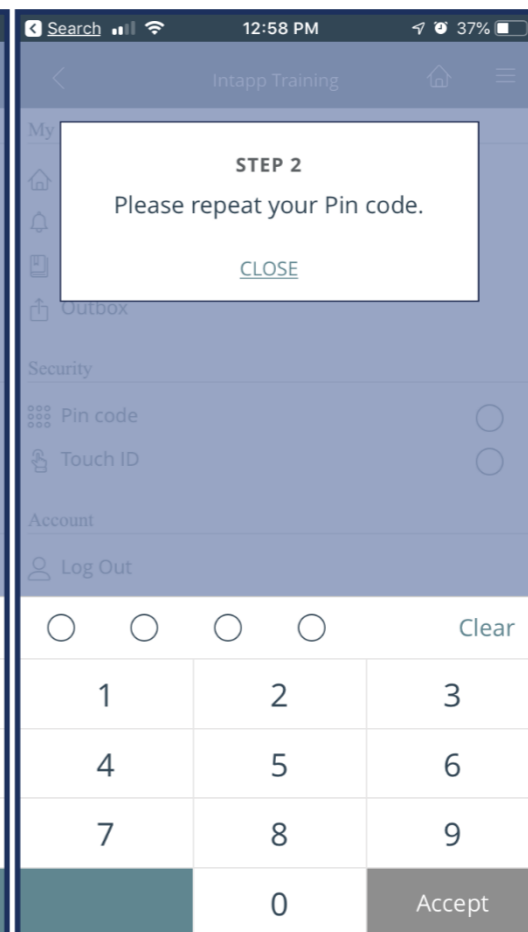
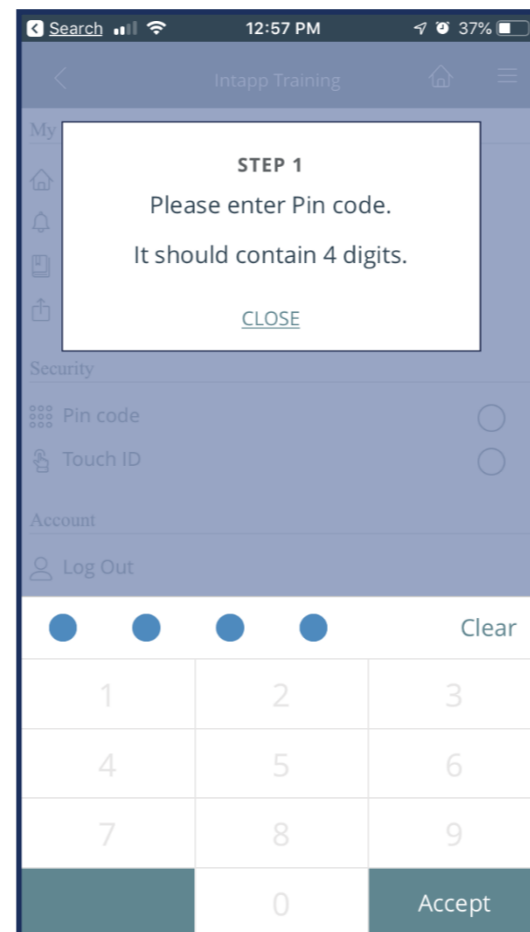
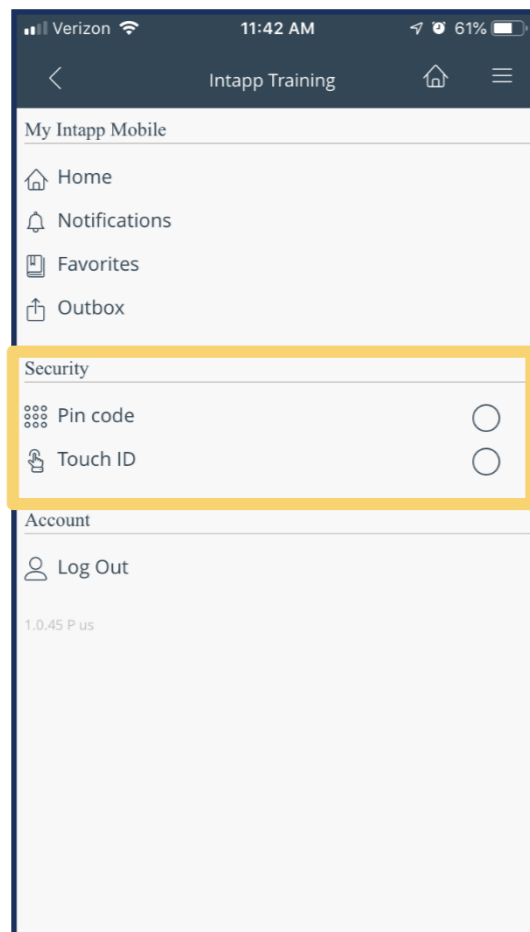
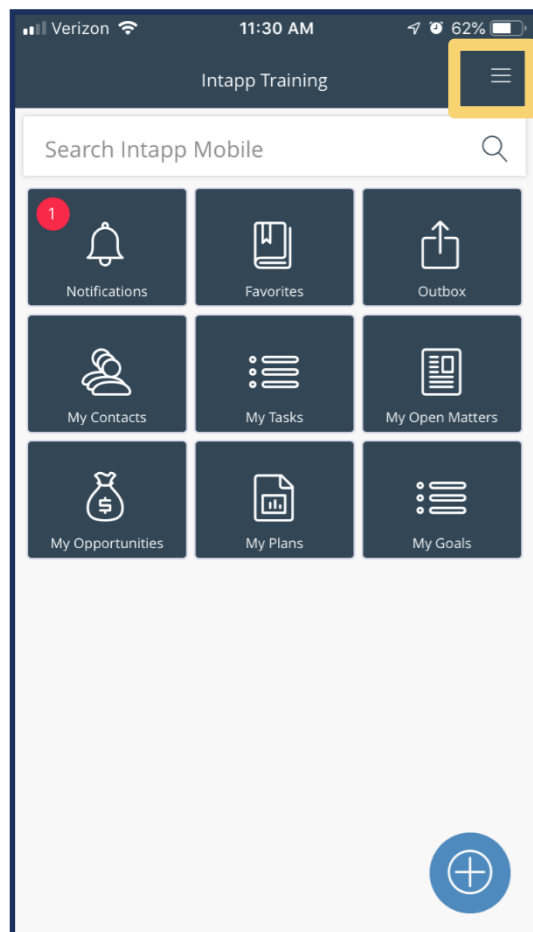


- Edit Pencil Icon and Details Dropdown**  
Select the edit pencil icon to open the edit entry window when viewing a details level page.  
  
Select the details dropdown menu to view other detail pages for the selected object.

Intapp OnePlace Mobile App users can choose to enable their mobile device's Touch ID recognition to allow access the Intapp OnePlace Mobile App. This will require the setup of a Pin Code first and then enabling Touch ID under the Security Settings of the Intapp OnePlace Mobile App.

### How to Enable Touch ID

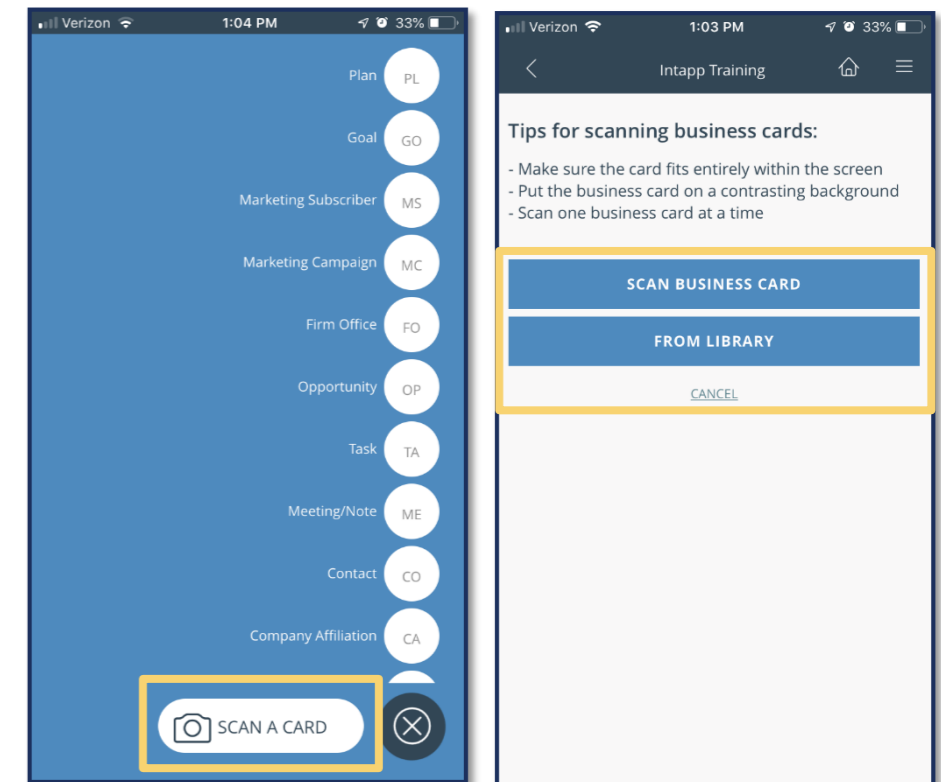
1. Login to the **Intapp OnePlace Mobile App**
2. Click the **three horizontal lines** from the homepage of the **Intapp OnePlace Mobile App**
3. Before enabling **Touch ID**, you must first **enable a Pin Code** from the **Security Settings**
4. Select **Pin Code** and enter a 4 digit pin (you will have to enter it twice to confirm the code)
5. After setting up your **Pin Code**, select **Touch ID** to complete the process for enabling **Touch ID**
6. Your **Security Settings** should now be updated with both the **Pin Code** and **Touch ID** enabled, allowing for access to the **Intapp OnePlace Mobile App** through fingerprint authentication.



The Intapp OnePlace mobile app provides the ability to scan a business card to create a new contact or update the information for an existing contact.

### To Create a New Contact by Scanning a Card

1. Open the Intapp OnePlace mobile app on your device.
2. Select the plus icon in the lower right corner and select **Scan a Card**.
3. You are presented with two options:
  - **Scan Business Card:** Use this option to take a picture of the business card.
  - **From Library:** Use this option if you have already taken a photo of the card and would like to select the photo from your device's photo gallery/camera roll.
4. Once a picture of the card is selected, there will be a few moments pause while the scan takes place. Any information that was successfully scanned from the business card (i.e. First Name, Last Name, Title, Phone, Address, Email, etc.) will populate in the fields on the Contact entry form. It is important to review the information that was imported from the card for accuracy and finish filling out any of the remaining required fields on your new Contact entry form.
5. Once ready to save the new Contact, scroll to the bottom and select **Save Changes**.



- ✓ **Make sure the Company for the contact is created prior to the scan.**
- ✓ **Ensure the card fits entirely within the camera screen.**
- ✓ **Put the business card on a contrasting background.**
- ✓ **Scan one business card at a time.**

### Updating an Existing Contact by Scanning a Business Card

1. Open the Intapp OnePlace mobile app on your device, search for the contact you need to edit and select it from the search results.
2. Select the pencil icon in the top right to edit the contact.
3. Select the camera icon in the top right of the Edit entry form. You are presented with two options:
  - **Scan Business Card:** Use this option to take a picture of the business card.
  - **From Library:** Use this option if you have already taken a photo of the card and would like to select the photo from your device's photo gallery/camera roll.
4. Once a picture of the card is selected, there will be a few moments pause while the scan takes place. Any information that was successfully scanned from the business card (i.e. First Name, Last Name, Title, Phone, Address, Email, etc.) will populate in the fields on the Contact entry form. It is import to review the information that was imported from the card for accuracy and finish filling out any of the remaining fields.
5. Once ready to save the updated Contact, scroll to the bottom and select **Save Changes**.