

Use This Checklist to Help You Get Started

As you get started using Intapp OnePlace, review this checklist to make sure you are ready to go and can start doing your part in expanding your firm's knowledgebase and powering your professional services process.

- ✓ Save the Intapp OnePlace web portal web address as a favorite
- ✓ Click through and get familiar with the dashboard menu items for your firm – Does all of the data look up to date? Is anything missing that needs to be added?
- ✓ Review the Intapp OnePlace Add menu items and make sure you are familiar with the entries that you are permitted to add. Do the entry forms and corresponding fields make sense to you? Do you have any questions on the process for entering data?
- ✓ Check your user profile settings, review your notification subscriptions and verify your task notification and date entry format settings reflect your preferences.
- ✓ Verify you can access the Intapp OnePlace Outlook Add-In – has it been downloaded yet? Do you need to check with your firm's IT for assistance? Has it been disabled?
- ✓ Practice syncing a test email using the Outlook Add-In
- ✓ Setup your Contact and Event sync in Outlook (if relevant)
- ✓ If your firm is using the Intapp OnePlace mobile app, make sure to download it so that you can start using it the next time you are on the go.
- ✓ Practice scanning a business card to create a new contact using the mobile app
- ✓ If you are on the EU database, make sure to update your phone's settings for the Intapp OnePlace mobile app to look to the Europe data center.
- ✓ Setup TouchID after logging into the Intapp OnePlace mobile app

If you need assistance with anything along the way and are unsure of who to reach out to, you can always contact support and we can help get you connected with the right person to answer your question.