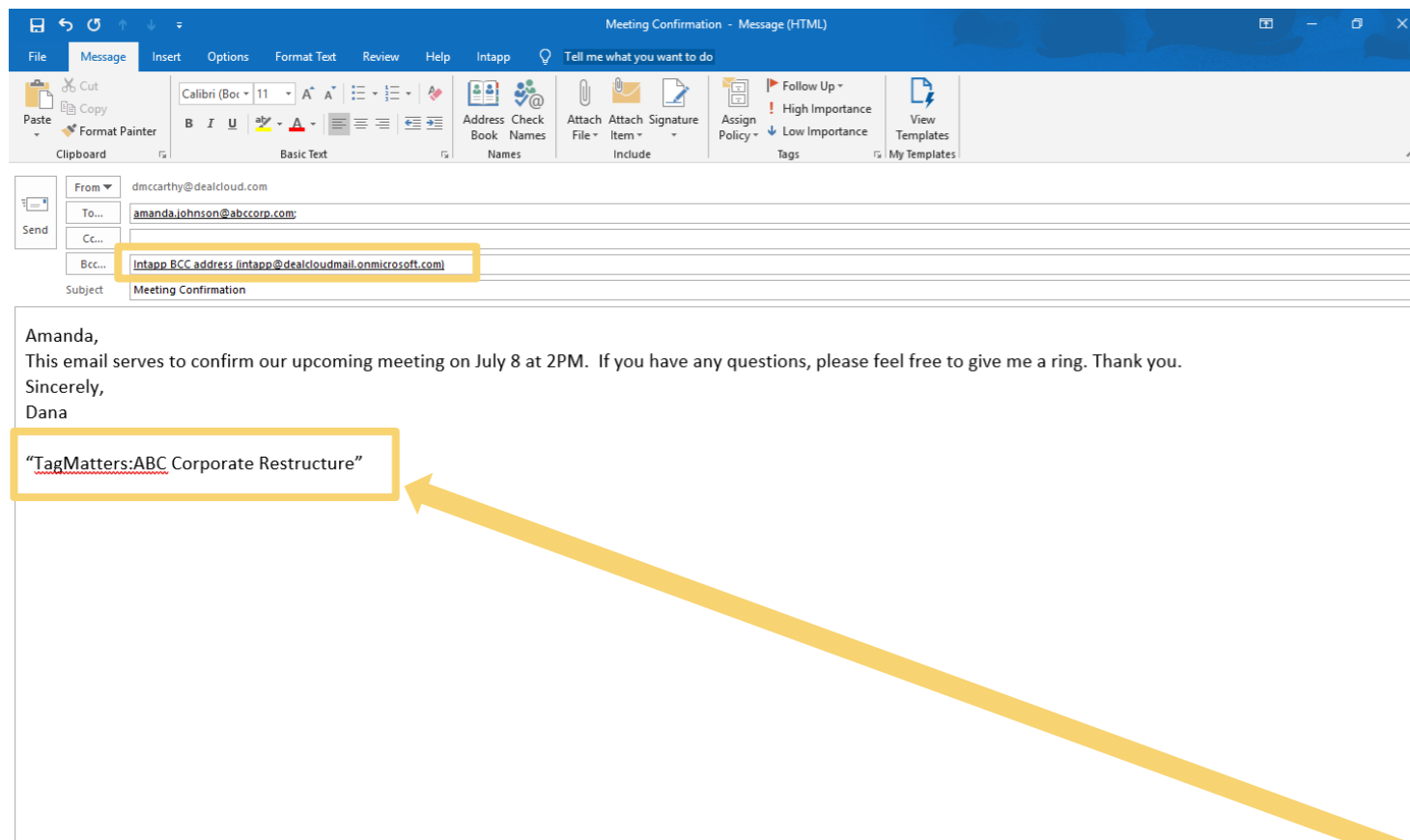


Overview

Emails can be tagged to Contacts, Clients, Matters, etc. in Intapp OnePlace using either the Intapp OnePlace Outlook Add-In email sync functionality or by copying or blind-copying emails to your firm's BCC email address.

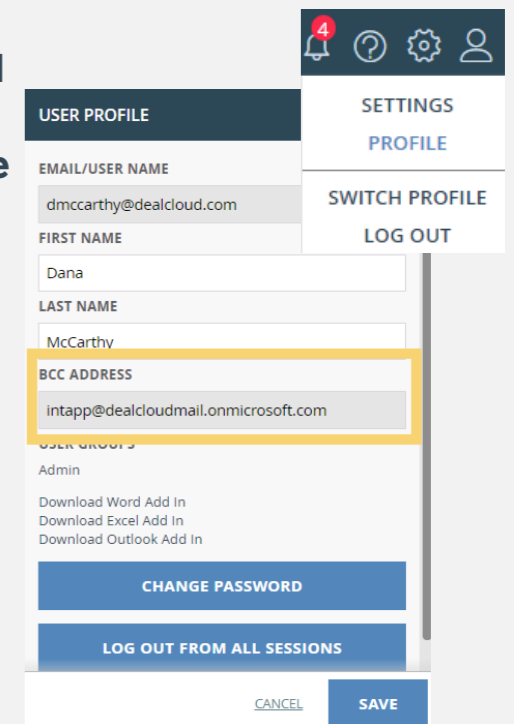
When using the firm's BCC email address, if the recipients of the email are currently contacts and associated with a company in Intapp OnePlace, the email will automatically be tagged to those entries. In order to tag emails to additional entries, you should incorporate the use of the tagging nomenclature within the body of the email as outlined in this quick reference card.



What is my firm's BCC email address?

You can access your firm's email address by logging into the Web Portal and clicking on the **Profile** icon at the top right.

Select **Profile** and copy the BCC address from the **User Profile** window.



Tagging Emails to Intapp OnePlace Entries

Contacts and their companies will be automatically tagged if the contact email address exists in the system. To tag additional entries for emails synced to Intapp OnePlace using the Intapp BCC email address, use the following nomenclature:

"TagFieldName:Value"

Examples:

- "TagContacts:Amanda Johson"
- "TagMatters:ABC Corporate Restructure"
- "TagCompanies:ABC Corporation"
- "Tag Opportunities:Project Falcon"