Practice Exercises & Instructions

For Intapp OnePlace Platform Manager Certification

To build on your foundational knowledge as or after you have completed your certification, you can perform these practice exercises in your environment so that you have the opportunity to learn by doing. The expected time to complete each practice exercise averages ~15 min. each section.

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Intapp OnePlace Basics

(Expected time to complete ~ 15 – 20 minutes)

What actions will you perform in this set of practice exercises?

- Creating a New Contact, Meeting/Note, & Opportunity using the Add Menu
- Creating entries using an Edit Grid
- General Portal Navigation & Search
- Setting Up a Notification

1. **Practice adding a new Contact & Company**
    a. From the web portal, locate the Add menu on the far right and select Add Contact.
    b. Add a new test Contact.
    c. While creating the contact, use the Add icon next to the Company field to add a new company that your test contact is affiliated with (e.g. Enter <Your Last Name> Corp. for the Company Name).
    d. The email address should be required (you can enter something like firstnamelastname@fakeemail.com for testing purposes)
    e. Once finished completing at least the required fields on both the new contact and the new company entry forms, click save to finish creating your new contact and company.

    ✓ Items to later delete: Contact, Company

2. **Practice searching/general navigation**
    a. Type search text for your new Contact in the search bar (note, you can also use the search query context of *Contact: followed by your search text* to narrow down your search query to only look within contacts).
    b. Click into the detail page for your Contact entry by selecting it from the search results and review the Contact details you have entered so far.
    c. Click the pencil icon to open the contact for edit. Update any additional field for the contact entry.
    d. Click Save to save your changes to this contact.

3. **Practice adding a new meeting/note**
    a. Next, while on the contact's detail page, click the Add menu from the top right and select Meeting/Note. Enter in a test meeting/note.
    b. Review that both the Company and the Contact tags appear on the new Meeting/Note entry form (these fields should be set to pre-populate with the tags for the entry you are located on when you click Add Meeting/Note from a contact's detail page.)
    c. Click your cursor into the Company field and notice how you can search for additional companies and tag more than one Company to a note entry (when needed.)
    d. Save your Meeting/Note entry and observe how the activity for your contact now displays the test meeting or note you have entered.

    ✓ Item to later delete: Meeting/Note

4. **Practice adding a favorite**

a. Now mark your newly created contact as a favorite by clicking the Favorite icon at the top right of the contact detail's page.

5. **Download the DealCloud Mobile application (search for DealCloud in the app store for your mobile device)**
    a. **Search for your test Contact in the search bar**
    b. **Select the contact**
    c. **Click the dropdown next to the Contact details**
    d. **Select Meeting/ Notes**
    e. **Notice the meeting/note entry appears here as well**
    f. **Click the Home icon at the top of the app**
    g. **Select the Favorites tile**
    h. **Notice how your contact displays here as well since you marked them as a favorite in the web portal**
    i. **Return to the Web Portal**

6. **Practice understanding the linkage of contacts/companies**
    a. In the Contact details dashboard, you will see the company you created display on the contact details page. Use the hyperlink for the company name to navigate to the Company details page.
    b. Note how the contact you created shows on the Contacts dashboard for this company.
    c. Locate the Activities data grid on the Company dashboard and review how your meeting/note entry also displays at the company level since you tagged that test note to this company.

7. **Practice using the Lists menu**
    a. Click on the Lists menu option from the main menu bar and select Contacts.
    b. Use the Filter icon at the top right of the page
    c. Create a filter to locate your test contact (e.g. Full Name contains or Full Name starts with)
    d. Click to apply the filter
    e. Note how your contact also displays in this list of contact entries.
    f. Note the ability to add additional contacts in bulk by clicking the Edit icon at the top of this contacts list and selecting Bulk Edit Entries. You would simply scroll to the bottom of the edit grid to the next available line at the bottom of your contacts list and tab through the Contact entry fields left to right for the new contact entries. You can enter multiple lines and then click Save.
    g. Switch to Lists > Companies and observe how the list of companies in your environment also displays here and think about how you will be able to eventually use the filter available on this page once your environment is populated with a full list of companies.
    h. Click the Edit icon at the top of the companies list and select Bulk Edit Entries. Practice adding a new company from the edit grid. Add in another test company and click Save at the bottom right of the edit grid.

    ✓ Item to later delete: Second company created

8. **Practice adding an opportunity**
    a. Search for the new company you just created in the search bar and follow the hyperlink to the company details page.
    b. Click Add Opportunity and enter in the opportunity name of "Project Practice (your initials)".
    c. Note how because you clicked on Add Opportunity from the Company details page how the company field is already pre-populated.

d. Enter a status of Business Development and select the first stage that appears for the Stage field.
e. Scroll through the new entry form for the opportunity and fill in any other required fields and click Save.
f. Refresh the Company details page and locate the data grid on your dashboard reports containing opportunities that displays the new association *of Project Practice (your initials)* to your practice company.

✓ Item to later delete: Opportunity

9. Practice setting a notification

a. Click back to the homepage of the portal by clicking on the Intapp OnePlace logo at the top left of the web portal.
b. Locate the dashboard that displays *open opportunities and see how Project Practice (your initials)* now appears on this grid.
c. On the All Open Opportunities grid, click on the bell/notification icon next to the Edit icon. Try setting up a notification titled "New Opportunity Alerts" and scroll down and select Instant for the frequency of your new opportunity notification, then click Save.
d. Now create another opportunity by clicking the Edit icon from the All Open Opportunities grid, select Bulk Edit Entries, scroll down to the first blank row and enter in details for your test opportunity by tabbing through the fields left to right (only the fields marked with a red asterisk are required.) Associate this opportunity with the second practice company that you created earlier. You can name this new opportunity "*Project Test <Your Last Name>*". Click Save.
e. Keep an eye out at the top right of Intapp OnePlace for the bell notification icon to see this alert coming through, informing you of the new opportunity added to the All Open Opportunities grid. Alerts cycle through every 15 minutes, so it may take a while from the point when you add Project Test <Your Last Name> to receive the notification.

✓ Item to later delete: Project Test <Your Last Name> opportunity

Outlook Sync Functionality

(Expected time to complete ~10 minutes)

What actions will you perform in this set of practice exercises?

- Syncing an Email, Meeting & Contact in Outlook

1. **Download the Outlook Add-In**
    a. Close Microsoft Outlook.
    b. Navigate to the User Profile at the top right of the portal (click the Profile icon and locate the Download Outlook Add-In link).
    c. Download and run the setup.exe file to complete the download of the Outlook Add-In.
    d. Re-open Outlook and login to the Intapp OnePlace Add-In (using the same credentials as the portal).

Note: The Outlook Add-In is supported in Office 2010, 2013, 2016 and 2019 (64 bit is recommended). The Add Ins are not supported on the My Office version of applications.

2. **Practice syncing an email**
    a. Login to the Intapp OnePlace Outlook Add-In.
    b. Launch a new email
    c. Enter a test subject and email body
    d. Type in the email address you used when you created your test contact
    e. Add your personal email address in the To field as well
    f. From either the Intapp ribbon or the Message ribbon at the top of the email, click the InfoPane icon.
    g. Notice the Intapp OnePlace InfoPane that appears on the right-hand side of the email.
    h. The email addresses of all contacts included in the email you have selected will be checked in the Intapp database and if they are associated with existing Contacts, those contacts will be automatically tagged to the email entry on the InfoPane.
    i. Notice how your test contact is picked up as an existing Contact and has a blue check next to the contact entry on the InfoPane and also how that contact's company entry is checked off as well on the InfoPane.
    j. Notice how your personal email address that was also in the To field was not picked up and matched to an existing contact and how it appears with a red plus icon in the InfoPane.
    k. Understand that in the event you were preparing to sync an email and wanted to create a new contact for the email addresses in your email that are not associated with an existing contact, you could simply click that red plus icon and add a new contact entry directly from the InfoPane. It is not necessary for this exercise to create a new contact, but be aware of this functionality.
    l. When syncing emails to the platform, you can add in additional tags other than just those that relate to who you are sending the email to.
    m. Practice tagging the email to an opportunity as well by clicking on Add Opportunity in the InfoPane and then click the dropdown arrow to search for and select the opportunity you created earlier, *Project Practice (your initials).*
    n. Click the Sync to Intapp icon at the bottom of the InfoPane.
    o. Once finished sending the email, return back to the web portal and use to search to get back to your contact's detail page.
    p. Locate the activity data grid on one of the existing contact dashboard reports and verify that you see your test email.
    q. Also, note that all email entries are stored under the Lists menu > Emails as well. You can always use the Filter icon at the top of this list of emails to narrow down the list of emails

you are viewing by criteria such as "Created By" or "Created Date" between or equal to a date range or specific date.

- ✓ Item to later delete: Synced email

3. Practice syncing a meeting

- **a.** Create a new meeting in Outlook at you normally would
- **b.** Enter the email address associated with your test contact as a meeting participant
- **c.** Click the InfoPane icon on the Outlook Meeting ribbon
- **d.** Notice how the InfoPane picks up the association of the Contact and their Company
- **e.** Notice how you are marked as an Internal Attendee as well
- **f.** Scroll down on the InfoPane and review the other fields that are associated with syncing meetings (only the fields with a red bar are required to save a meeting to Intapp)
- **g. Click Create in Intapp**
- **h. Go to the Web Portal and search for your test contact and notice how the synced meeting now appears in their activities grid**
- **i. Hover to the left of the meeting name in the Activities grid and choose edit**
- **j. Scroll down the entry form to the notes area – understand that this is one option for how you can append a synced meeting with meeting notes. One other frequently used option is to select the event from Outlook after the meeting has occurred, click the InfoPane, scroll down to the notes area, enter the notes and then click Save Changes.**

- ✓ Item to later delete: Synced meeting

4. Practice creating a new contact and syncing to Intapp OnePlace

- a. Create a new contact as you normally would in Outlook.
- b. Notice the Intapp OnePlace InfoPane that appears on the right-hand side. If you do not see it, click the InfoPane Icon in the Contact ribbon.
- c. Enter in the first name, last name, company and email fields in the Outlook new contact window. On the InfoPane of the Outlook Add-In, review any remaining required fields that you might need to fill out before saving this contact. To refresh data that you added in Outlook that may not appear in the InfoPane, toggle the InfoPane off and then on again by clicking on it twice.
- d. Click Create in Intapp in the InfoPane and save and close the Outlook contact.
- e. Once finished creating the Outlook contact, return back to the web portal and search for the new contact in Intapp OnePlace to verify its creation was successful.
- f. Hover over the contact's email address on the Contact detail's page in the web portal, left click on it and choose Data Audit. Notice how this is traced back to the source of Outlook, since the contact was creating using the Outlook Add-In.

- ✓ Item to later delete: Synced contact

Managing Portal Dashboards

(Expected time to complete ~20 minutes)

What actions will you perform in this set of practice exercises?

- Creating a firm-level dashboard report
- Adding content (data grid and pie chart) to your dashboard report
- Renaming and reordering a dashboard report

1. **Practice creating a new firm-level dashboard report**
    a. First navigate to the homepage by clicking on the Intapp OnePlace logo at the top left of the web portal.
    b. Click the gear icon at the top right of the portal to switch into "edit mode".
    c. Click the Add icon and fill out the Add Report window details:

        i. Report Name: Practice Dashboard (your initials)
        ii. Select any icon to display next to the report name
        iii. Leave the report checkbox set to Live
        iv. Leave the report applicable to All User Groups, Click Save.
        v. You will remain in Edit Mode where you can now continue with adding content to your new report. Stay on this screen and move to the next practice exercise.

2. **Practice creating a Data Grid**
    a. Click the Gear icon on the middle of the report to select a widget to add to the report.
    b. Select Data Grid.
    c. Title the data grid in the Configure Widget window "Open Opportunities".
    d. Click the Edit icon in the Lists area and locate and select the Opportunity list (note in your environment this might be named slightly different – such as Engagement). Once selected, click Close.
    e. Drag and drop the Opportunity Name field as well as the Company Name field, Status and Stage fields that relate to your opportunities from the fields section at the bottom left over to the right-hand area of the Configure Widget window. Note, you can drag and drop these fields or click the plus sign to add them to the view.
    f. Click the Filters icon at the top right and click on the dropdown where you see the Name field and select the Status field.
    g. Change the next selection on the filter to "=" instead of "in" and select Business Development.
    h. Click Apply Filters.
    i. Click Apply at the bottom right of the Configure Widget window to save your new data grid.
    j. Click Save and Close at the top and observe your new dashboard and data grid displaying on the left-hand panel and the Dashboard dropdown menu.

3. **Practice creating a Pie Chart**
    a. While on any firm level dashboard page, click the gear icon at the top right of the portal to enter back into "edit mode".
    b. Locate your practice dashboard on the left-hand side while in edit mode and make sure you are located on this dashboard.
    c. Click the "split horizontal" icon (third icon on the right in your existing data grid) to split the widget into two and add another widget by clicking the gear icon on the new widget area you just created.
    d. Select Chart.
    e. Click the Edit icon in the Lists area and locate and select the Company List and click Close.
    f. Click the plus icon next to the Company Name and Type fields to add them to your view from the field's area at the bottom left.

g. Either click Next down at the bottom right of the Data Set section or click Pivot along the top progress line to move to the second step of setting up your pie chart.
h. Under the Category (Rows) dropdown at the top left, select the Type field. For Values, select Company Name. The data should now be grouped to count the number of companies tagged to each company type.
i. Click Next at the bottom right or click Display along the top menu selection.
j. For Display Type, select Chart.
k. Click the plus icon next to Chart Type and select Pie.
l. Expand the Titles section on the left-hand side and enter a title for your pie chart (i.e. Companies by Type).
m. Expand the Labels setting and select Show Labels and change from Number to Percentage.
n. Change the Legend setting to Show Legend.
o. Click Apply at the bottom right of the Configure Widget window to save your pie chart.
p. Click Description and enter a brief description that will appear as a mouseover tool tip to your users (i.e. Click on a segment of the chart to view details).
q. Click Apply.
r. Click Preview to view how your widgets will display on your practice dashboard.
s. Click Edit and practice resizing these two widgets by hovering your cursor in between these widgets and use the resize bar to adjust the height of your widgets.
t. Click Save and Close to exit edit mode and save your changes.

4. Practice renaming your Dashboard and reordering your Dashboard

a. Click the gear icon at the top right of the portal to enter back into edit mode.
b. Locate your Practice Dashboard on the left-hand panel.
c. Click the dropdown arrow next to the dashboard name and select Edit.
d. Rename your dashboard to "Practice Dash (your initials)" and click Save on the edit report window.
e. Select your "Practice Dash" dashboard and drag and drop it along the left-hand panel to reorder it to a different place on the dashboard menu.
f. Click Save and Close to save your recent edits (both the rename and the reorder of the report).

✓ Item to later delete: Practice dashboard

Word Add-In Template Reports

(Expected time to complete ~30 minutes)

What actions will you perform in this set of practice exercises?

- Creating List and Entry Type Word template reports
- Scheduling a List Type report for distribution
- Modifying report settings under Tools > Template Reports

1. **Download the Word Add-In**
    a. Close Microsoft Word.
    b. From the user profile at the top right of the portal (click the profile icon and locate the Download Word Add-In link), locate the Word Add-In.
    c. Download and run the setup.exe file to complete the download of the Word Add-In.
    d. Re-open Word and login to the Intapp Add-In (using the same credentials as the portal).

2. **Practice creating a Word List Type Report**
    a. Click New Template on the Intapp OnePlace Word Add-In ribbon.
    b. Name your report "*Practice Weekly Active Opportunity Sheet (your initials)*".
    c. Leave the type as List and click Create.
    d. For this practice list report, you will be generating a report that displays a table of the open opportunities in your environment and scheduling that report to run on a weekly basis.
    e. Type a title for your report by simply typing in a report title into the top of the Word document (i.e. Weekly Opportunity Sheet).
    f. Click enter to move to the next line on your Word report.
    g. Now, to add a table of open opportunities, click Add View and select Grid.
    h. Enter the name "Open Opportunities" at the top left of the view builder.
    i. In the View Builder window, click the Edit icon in the Lists area and locate and select the Opportunity object (note in your environment this might be named slightly different).
    j. Drag and drop the Opportunity Name field as well as the Company Name field, Status, Stage, Open Date, and Anticipated Close Date fields that relate to your opportunities from the fields section at the bottom left over to the right-hand area of the View Builder window. Note, you will drag and drop these fields one at a time. To reorder fields once added, click on the Columns icon at the top right and drag and drop them in the desired order.
    k. Click the Filters icon at the top right and click on the dropdown where you see the Name field and select the Status field.
    l. Change the next selection on the filter to "=" instead of "in" and select Business Development.
    m. Click Apply Filters.
    n. Click Save at the bottom right of the View Builder window to save your new view.
    o. You will see the newly created view listed on the right-hand panel. Place your cursor over the Open Opportunities view, select it and drag it over to the left into the Word document.
    p. You should see a table display with your new open opportunities view in the Word document, with variable placeholders such as «Opportunity:Opportunity_Name».
    q. Test out the view by clicking Run Report on the Intapp Add-In. A generated version of the report will open so you can preview what it will look like when generated.
    r. Close the previewed version and click back into the template report you started. To save the report, click Check In Template on the Intapp Add-In.
    s. Click Check In New.
    t. The name you previously gave the report appears. Click Check In.
    u. You will be prompted to Check In Live or Check in Draft. Select Check In Live.
    v. Click Continue.

3. **Practice scheduling the list type report for distribution**

List type template reports can be scheduled for distribution using the Tools > Template Reports area of the web portal. For example, you can schedule a weekly opportunity report to auto-generate in an email with the report attached as a PDF or Word doc. The template report that you configure and setup in Word determines the appearance and content that the generated report displays.

a. Go to the web portal and navigate to Tools > Template Reports.
b. Click the pencil icon to the left of the practice weekly opportunity report name.
c. Click the Document Properties tab on the left and drag and drop in the wildcard fields that display such as [Report Name] and [Date] into the Document Title field. This determines the name of the document that gets generated during the distribution process. Typically, this is a concatenation of the report name and the date it is generated ([Report Name]_[Date])
d. Select your desired report format (PDF or Word) for the file type that should generate when you run this report (PDFs render best on mobile devices.)
e. Click into the Scheduling tab and select yourself as a recipient for this report to test the scheduling functionality.
f. Set the frequency to the desired date and time you would like to perform a test run for the generation of this report.
g. Click New next to the Email Template field to create a custom email subject and body for your practice run of the weekly opportunity report. Use the wildcard fields to set up your email subject and body where relevant (i.e. Dear <user first name>).
h. Click Save.
i. Wait until the date and time that you set the report to run and review the email subject, body and the attached weekly opportunity sheet that gets generated to understand the process for auto-generating list type reports using the Word Add-In. Try to connect the dots about how your configuration of both the report itself that you created in Word and the report settings that you set up under Tools > Template Reports determined the content of the document that is attached to the email and the subject/body of the generated email that delivers the report.

✓ Items to later delete: List report template, email template

4. Practice creating an entry detail type Word report

The idea behind these reports is that you can generate a "tearsheet-like" report quickly from a detail page and print that report out for reference (i.e. A contact tearsheet with contact details; an opportunity Tearsheet with meetings, notes and email activity; a Company tearsheet with company description, location details and a table of associated Contacts; Plans with associated goals and their status, etc.) Once created in the Word Add-In and made available for the list (i.e. Contact, Company, Opportunity, Plan) there will be a report icon at the top right of the entry detail pages that users can use to generate the tearsheet-like reports on the fly.

a. Click New Template on the Intapp Word Add-In ribbon.
b. Name your report "Practice Entry Tearsheet (your initials)".
c. Change the Type to Entry, select Company as the main list and click Create.
d. You will see a selection pane on the right-hand panel that lists the fields associated with the main list you created.
e. Practice dragging and dropping in a few fields into the Word document on the left by hovering your cursor over the field name (i.e. Company Name) from the panel on the right and moving that element into the document.
f. Play around with formatting the fields (center align, bold, etc.) – try to envision what you want your tearsheet to look like and format accordingly.
g. Now practice adding in a view so you can populate a list of the Contacts that are associated with the main list entry (company) that you have selected. Click the Add View icon on the Intapp Word Add-In, select Grid and name the view "Company Contacts" at the top left Name field.

h. In the View Builder window, click the Edit icon in the Lists area and locate and select the Contacts list.
i. Add the Full Name field, the Company Name field, the email address field and last activity date (plus any other fields you wish to include in your contacts table) into the right-hand area of the View Builder window.
j. Click the Filters icon at the top right and click on the dropdown where you see the Name field and select Company Name.
k. Change the next selection on the filter to "=" instead of "in" and select "Context entry."
l. Click Apply Filters.
m. Click Save at the bottom right of the View Builder window to save your new view.
n. The application of the "context entry" filter is what will make this table of contacts filter out only contacts associated with the company the report is generated for (i.e. When a user is looking at the detail page for ABC Corporation, the Company Contacts view should only display those contacts that are associated with ABC Corporation and when a user generates the report for a different company, the Company contacts view should generate with just the contacts that are associated to that company).
o. You will see the newly created view listed on the right-hand panel. Place your cursor over the Company Contacts view, select it and drag the view over to the left into the Word document underneath the company name and other fields that you selected in the first part of this exercise.
p. You should see a table display with your new company contacts view in the Word document, with variable placeholders such as <<Contact: Full_Name>>.
q. Test out the view by clicking Run Report on the Intapp Word Add-In. You will be prompted to select an entry to run the report for. Select one of your practice companies that has an associated contact and click generate. A generated version of the report will open and you can see what the report will look like once generated.
r. Close the previewed version and click back into the template report you started. To save the report, click Check In Template on the Intapp Word Add-In.
s. Click Check In New.
t. The name you previously gave the report appears. Click Check In.
u. You will be prompted to Check In Live or Check in Draft. Select Check In Live. Click Continue to check this new template report in.
v. There is one last step before the report can be utilized by end users from the Company detail page. Under the Tools > Template Reports section of the web portal, locate this new report and click the pencil icon.
w. Review the default for the Document Title field. This determines the name of the document that gets generated when a user runs this report for an entry. Typically, this is a concatenation of the report name, the entry name and the date it is generated or some other combination of report title and entry name (i.e. If *[Entry Name] Tearsheet [Date]* is defined as the document title, when a user runs the report for ABC Corporation on June 15th, 2019, a report would be generated with the title "ABC Corporation Tearsheet 06-15-2019")
x. Select your desired report format (PDF or Word) for the file type that should generate when you run this report and check off whether or not you would like for a copy of each generated version of this report to be tagged to the entry it gets generated for (i.e. Should the tearsheet file that is created appear as a document tagged to the entries when a user generates this report?) Click Save.
y. Practice generating this report from an entry detail page by searching for a company (i.e. *<Your Last Name> Corp.* or the other practice company you created) and clicking on the Entry Detail Report icon at the top right of any entry detail page. Select the tearsheet report and click Generate. Notice how the setup you created in the Word Add-In determines the content that is generated in this report.
z. Note that you can also run these reports directly from Tools > Template Reports and even select multiple entries at a time. Practice generating this report from the Tools > Template

Reports page by clicking the play/run icon and selecting more than one entry in the Entries field and clicking generate. (Note that the General tab of the Edit Report settings includes a Multiple Entries setting which determines whether or not the file generated when multiple entries are selected should produce one combined report or if it should generate multiple files for each entry selected.)

- ✓ Items to later delete: Entry report template

Linking Excel Reports

(Expected time to complete ~15 minutes)

What actions will you perform in this set of practice exercises?

- Creating Intapp Excel Formulas (DCPull and DCView)
- Saving a View to the View Library, Deleting a Saved View

1. **Download the Intapp Excel Add-In**
    a. Close Microsoft Excel.
    b. From the user profile at the top right of the portal (click the profile icon and locate the Download Excel Add-In link).
    c. Download and run the setup.exe file to complete the download of the Excel Add-In.
    d. Re-open Excel and locate and login to the Intapp Excel Add-In (same credentials as the portal).

2. **Practice creating a DCPull formula to retrieve a field at the Contact level**
    a. In order that you can link data points into your Excel spreadsheets, you will need to know how to write a DCPull formula.
    b. Open a blank Excel spreadsheet and place your cursor in cell A1 for this first DCPull exercise:
        i. On the Intapp Add-In ribbon, select DCPull.
        ii. In the DCPull wizard, click the dropdown for List and select Contact.
        iii. In the entry dropdown, select your contact (Note that you can use the search area when you click the dropdown arrow for this parameter to quickly find your contact).
        iv. In the field dropdown, search for and select Company Name.
        v. Click Run.
        vi. You should see <Your Last Name> Corp. display in cell A1 in which you created your DCPull formula.
        vii. Review the completed formula in the Excel formula bar to understand how the parameters display once a DCPull formula is created (as an example, to pull the company associated with the contact Katy Plott, the DCPull would look like *=DCPull("Contact","Katy Plott","Company",)*

    c. Practice linking your DCPull formula parameters to cells that contain those values
        i. Type in the text *Company* into cell C1 in your spreadsheet and edit your DCPull formula to remove the hardcoded value for "Company" and replace it with C1. For example, my DCPull formula would look like *=DCPull("Contact","Katy Plott",C1,).*
        ii. The concept here is that in order to link your spreadsheets to Intapp OnePlace you will not need to create individual DCPull formulas using the DCPull wizard and that you can use the content already in your spreadsheet to build your DCPull formulas (such as linking the Entry or Field parameter).

3. **Practice writing a DCPull to retrieve a field at the opportunity level**
    a. Click into cell A2 and select DCPull from the Intapp Excel Add-In.
    b. Select Opportunity from the List dropdown.
    c. Click the dropdown for Entry and locate one of your practice projects (i.e. Project <Your Last Name>).
    d. Click the dropdown for field and search for or scroll to locate and select the Stage field.
    e. Click Run.
    f. You should see the value for stage for the selected opportunity displaying now in cell A2 and in the formula bar your DCPull should look similar to this one =DCPull("Opportunity","Project Adams","Stage",)

g. Pause to understand how this DCPull was drawing data from the list "Opportunity"" (vs. Contact, Company, etc.) as the field that we wanted to display is stored at the opportunity level.
h. Go to the Web Portal, search for the opportunity, click the pencil icon at the top right of the opportunity detail page to open it for edit, update the stage value and click Save.
i. Return to Excel and click the Refresh icon on the Intapp Add-In. Notice how the value returned from the formula now reflects the updated stage value.

4. Practice creating a DCView formula to retrieve a table of data related to multiple entries

a. In this exercise, you will be retrieving a list of opportunities and a few fields that relate to those opportunities.
b. On a blank Excel spreadsheet, click into cell A1 and select DCView from the Intapp Excel Add-In.
c. Click the Edit icon in the Lists area at the top left of the view builder and locate and select the Opportunity list and click Close.
d. Add the Opportunity Name field as well as the Company Name field, Status and Stage fields that relate to your opportunities from the fields section at the bottom left over to the right-hand area of the View Builder.
e. Click Run to run your DCView.
f. You will see a list of opportunities populate in a tabular format in Excel.

List Management

(Expected time to complete ~10 minutes)

What actions will you perform in this set of practice exercises?

- Observing the setup of an existing list under Tools > List Management

1. **Practice viewing the details surrounding entry forms and fields**
    a. Go to Tools > List Management.
    b. Click the pencil icon next to Contacts.
    c. Note the selection for Add Entries From. This is typically set to Web and Mobile Add Menu, Bulk Edit and Web Entry Forms. Web and Mobile Add means that new users can add contacts from either the web portal Add menu or through the mobile app. Bulk Edit means that users can click into a data grid and add new entries from the Edit Grid and Web Entry Forms is what allows the blue Add icon to appear next to a reference field that looks to this List (so that users can add new entries from an entry form for another List.)
    d. The Include in Quick Search checkbox is what makes the contacts appear on the Quick Search dropdown when you type in search text. A list such as Documents might not be marked as available in Quick Search since that might clutter up the search results, but it will be marked as Include in Full Search (this is the option that will always appear at the bottom of the quick search as *View All Results*.).
    e. The Entry Level Capabilities setting drives whether or not you want to securitize this list through User management.
    f. Display in List Menu determines whether or not entries for this list should display on the Lists menu.
    g. Entry Detail Pages are what drive whether or not this list will need its own dashboard level pages.
    h. Select Fields on the left-hand side and review the existing fields for Contacts.
    i. Click the pencil icon for Full name and observe how this is a calculated field that combines [First Name]&" "&[Last Name].
    j. Click cancel out of the Full Name field and now click into the pencil icon for the Company Name field under Contacts.
    k. Notice how this field references another list: Companies. Notice also that it will be set to "Inherit On New" so that, as an example, when you are on a company page and click Add Contact, the company field will auto-populate.
    l. Cancel out of the Company field.
    m. Click Edit Entry Form.
    n. Think back to when you clicked Add Contact how you had several fields displaying. The entry form setup here is what drove the fields that populated on your entry form. The concept here is that you can organize your fields into sections in an entry form and also create tabs that should only appear if certain criteria are met (i.e. If an Opportunity status stage is marked as Referred and the stage as Client Conflict, generate a tab on the edit entry form to request the fields "Referral to Company" and "Referral to Contact."
    o. Click cancel and don't save any changes to your Contacts list for now.
    p. Your implementation analyst will assist all new clients with setting up your initial entry forms, but if you are an existing client and have further questions on your entry forms or fields please feel free to reach out to Client Success or your Account Manager.

Practice Exercises – Data Cleanup

(Expected time to complete ~5 minutes)

What actions will you perform in this set of practice exercises?

- Cleanup your practice exercise data from your environment and simultaneously learn how to cleanup/delete data.

1. **Delete your practice contacts**
    a. Search for your Contacts one at a time and navigate to the entry detail page for each contact.
    b. Click the delete icon at the top right of the entry detail page and confirm your delete.

2. **Delete your practice companies**
    a. Search for your practice companies one at a time and navigate to the entry detail page for each company.
    b. Click the delete icon at the top right of the entry detail page and confirm your delete.

3. **Delete your practice opportunities**
    a. Search for your practice opportunities one at a time and navigate to the entry detail page for each opportunity.
    b. Click the delete icon at the top right of the entry detail page and confirm your delete.

4. **Disable your new opportunity alert notification**
    a. Click on your profile icon at the top right of the web portal.
    b. Select Settings.
    c. Hit the delete icon next to the Open Opportunities practice notification.

5. **Delete your synced email and meeting/note**
    a. Go to Lists > Emails and filter for emails created by you.
    b. Hover your cursor over the email subject and click the dropdown arrow and select delete
    c. Repeat this process for the Meeting/Notes List.

6. **Delete your practice portal dashboard**
    a. Click on the Intapp OnePlace logo at the top left of the web portal.
    b. Click the gear icon at the top right of the web portal to enter into "edit mode."
    c. Locate your practice dashboard on the left-hand panel and click the dropdown arrow and select Remove (another option if you want to save the report is to uncheck Live so the report only shows to platform managers that are in edit mode.)
    d. Click Save and Close from the main menu bar.

7. **Disable (or delete) your practice Word template reports**
    a. Go to Tools > Template Reports.
    b. Locate your practice list report and your practice entry report.
    c. Click the disable icon (the icon that displays directly to the left of the report name) to disable this Word template report or the delete icon to delete it.
    d. Locate the practice tearsheet report and disable or delete this as well.