

About List Management

Intapp OnePlace stores entries (data inputs) to **Lists**. Within each list, **Fields** are set up to collect and calculate the relevant information. Lastly, **Entry Forms** are then created to collect data.

The configuration and maintenance of Lists, Fields and Entry Forms all resides in the Web Portal under **Tools>List Management**. This area is accessible to platform managers with the relevant List Management capabilities.

Lists and List Types

There are 5 different types of Lists. **Entity, Person, Activity, Aggregation** and **Relationship**.

Entity Type List

Examples include:

- Companies
- Campaigns
- Opportunities
- Plans

Activity Type List

Examples include:

- Tasks
- Emails
- Meeting/Notes

Aggregation Type List

Examples include:

- US States
- US Metro Areas
- Postal Codes
- Countries

Person Type List

Example:

- Contacts

While you can create additional Lists in Intapp OnePlace, the more common interaction you can expect to have with List Management is modifying entry forms for existing Lists or creating new fields, as an example.

Fields & Field Types

Fields are added to **Lists** to collect data inputs, and in some cases, to perform calculations based on inputs. Fields are created in the **Edit List** window, under the **Fields** section. When fields are created, the **Field Type** is selected. Field types include:

- | | | |
|-----------------|-------------------|---------------|
| ■ Text | ■ Reference | ■ Smart |
| ■ Choice | ■ Yes/No | ■ Calculation |
| ■ Number | ■ User | ■ Attachment |
| ■ Date and Time | ■ Autoincremental | ■ Image |

Settings for each field drive the behavior, formatting and acceptable entry values:

- **Required:** Whether or not the field is required
- **Format:** How the field should be formatted when displayed on dashboards in the web portal (Number type, text type, etc.)
- **Choice Field Options & Levels:** For Choice fields, what choices users should be prompted with when entering a value for that field, as well as how many levels the choice should disseminate to
- **Allowed Lists:** For Reference fields, what other Lists the field should reference as a lookup
- **Allow Multiple Selections:** Whether or not more than one selection can be made for that field
- **Allow Duplicates:** Whether or not duplicate values can be loaded
- **Default Value:** Whether or not the field should populate with a default value in the Entry Form
- **Formula:** For calculated accounts, what formula should be used to calculate a value
- **Inherit on New:** Whether or not the field should pre-populate using the context of the entry you are viewing

Fields & Field Types (continued)

Example **Fields** for the List **Contacts** include:

Field Name	Field Type	Example Value
First Name	Text (Single Line)	John
Last Name	Text (Single Line)	Smith
Full Name	Calculation: [First Name]&" "&[Last Name]	John Smith
Company	Reference (Refers to another List): i.e. Companies	Healthcare Corp
Contact Type	Choice (Refers to a defined list of choices): Referral Source, Accountant, Attorney, Business Broker	Alumni
Email	Text (Format as Email)	js@healthcarecorp.com
Website	Text (Format as URL)	www.healthcarecorp.com
Direct Business Phone	Text (Format as Phone Number)	(212) 555-1234