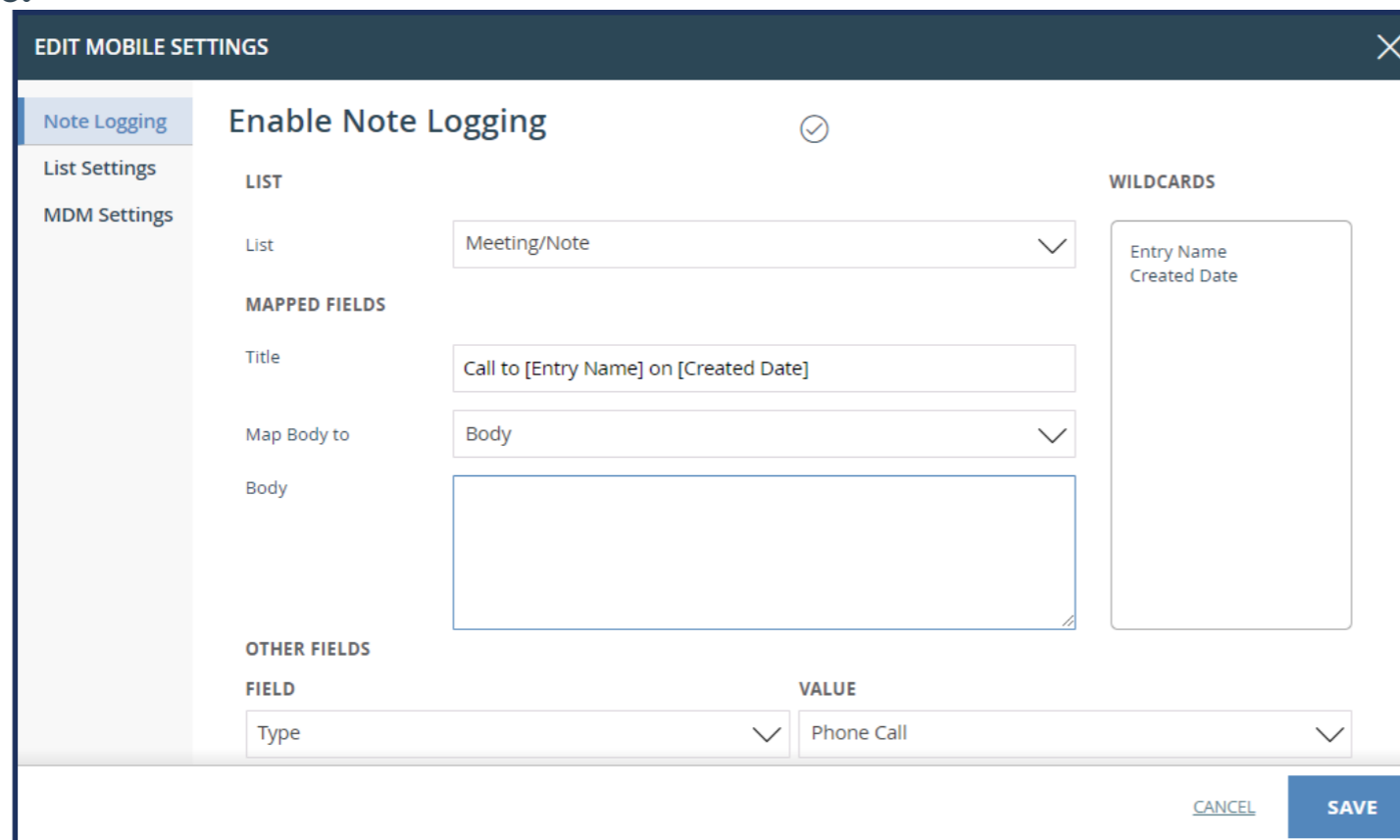


The Intapp OnePlace Mobile App offers the ability to automatically log a call after pulling up a contact in the Mobile App and clicking the Contact’s phone number to make a call. Upon completing the call, a pre-populated Intapp OnePlace note will pop up and allow the user making the call to finish entering details on that note entry. The relevant tags (i.e. the Contact and/or Contact’s Company) will pre-populate as well. In order to use this feature, your firm’s *Note Logging Mobile Settings* need to be set up first.

SITE SETTINGS – Mobile Settings

1. Navigate to **Tools > Site Settings > Mobile Settings**.
2. Select the **List** you would like the call to log to (i.e. Select **Meeting/Note** if you want to log calls made from the Mobile App as **Meetings/Notes** in Intapp OnePlace). Note, your firm may refer to Meetings/Notes by some other name.
3. Set up a desired **Title** for your note to pre-populate with (i.e. “Call to [Entry Name] on [Created Date]”). The note that pre-populates after you end the call will fill in the wildcards with the contact’s name and date and time of the call in this example title.
4. Select the field to map the body of the note to (in most environments this will be “Body”).
5. Add in other fields you would like to pre-populate the note with (i.e. **Type**).
6. Click **Save**.



Example Mobile Note Popup Screen

After making a call from a Contact in the **Mobile App**, a note will automatically appear on the **Intapp OnePlace Mobile App** for you to enter any details you think are necessary. You can save the note with your edits. Even if you do not enter note details, the call will be logged automatically.

