



Intapp Relationships Out of the Box Filters

Filters allows the administrator to route contacts that have a specific characteristic to a single DQM editor, or to the Trash Can. There are 13 default filters which are configured and enabled on your system upon installation. The default filters will help to ensure that the most accurate data possible will enter your Intapp system. Below is a description of each default filter that comes out of the box.

What is It?

Intapp: Contacts Older than 30 Days Filter

Type	Calculation	Comparison	Value	Active
<input type="radio"/> CRM Field <input checked="" type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Received, by days old	Choose One	Is greater than	30 Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

What does it do?

Removes contacts which were received more than 30 days ago. The number of days can be edited.

Recommendation:

If the client expects any kind of backlog in the Data Quality Manager (DQM) while users are getting up to speed on processing and committing contacts in the DQM, recommend increasing the number of days to a more manageable number, such as 60 or 90 days.



What is It?

Intapp: Email Does Not Contain First or Last Name Filter

Name: Intapp: Email Does Not Contain First or Last name Override Reservations Frequency: None

Type	Calculation	Comparison	Value	Active
<input type="radio"/> CRM Field <input type="radio"/> Metadata Field <input checked="" type="radio"/> CRM Field Calculation Email	Other field value	Does not contain	First Name Last Name Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

Add row **Cancel** **Save**

What does it do?

Removes contacts whose email does not contain a first or last name.

NOTE: The names of the fields in the **Value** column are based on the CRM sink in place.

Recommendation:

If the client expects they may miss any legitimate contacts because of this filter (Ex. contacts with only first and last initial in email address), recommend creating a separate DQM user account to catch these contacts so someone can review on occasion.

What is It?

Intapp: First Name Unusual Characters Filter



Name: Intapp: first Name Unusual Characters Override Reservations Frequency: None

Type	Calculation	Comparison	Value	Active
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation First Name	Choose One	Contains	0 1 2 Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

Add row Cancel Save

What does it do?

Removes contacts with unusual characters or numbers in the first name field.

What is It?

Intapp: Internal Contacts Filter

Name: Intapp: Internal Contacts <MUST ADD DOMAIN> Override Reservations Frequency: Daily

Type	Calculation	Comparison	Value	Active
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Email	Choose One	Contains	<ADD DOMAIN> Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

Add row Cancel Save

What does it do?

Removes contacts with email domain of your company.



What is It?

Intapp: Last Name Unusual Characters Filter

Name: Intapp: Last Name Unusual Characters Override Reservations Frequency: None

Type	Calculation	Comparison	Value	Active
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Last Name	Choose One	Contains	0 1 2 Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

What does it do?

Removes contacts with unusual characters or numbers in the last name field.

What is It?

Intapp: Long Company Names Filter

Name: Intapp: Long Company Names Override Reservations Frequency: None

Type	Calculation	Comparison	Value	Active
<input type="radio"/> CRM Field <input type="radio"/> Metadata Field <input checked="" type="radio"/> CRM Field Calculation Company name	Length	Is greater than	40 Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>



What does it do?

Removes contacts with company names that are more than 40 characters. The number of characters can be edited.

What is It?

Intapp: Mismatched Email Addresses Filter

Name		Frequency		
Intapp: Mismatched Email Addresses		None		
<input type="checkbox"/> Override Reservations				
Type	Calculation	Comparison	Value	Active
<input type="radio"/> CRM Field <input type="radio"/> Metadata Field <input checked="" type="radio"/> CRM Field Calculation Email	Other field value	Does not equal	CMC Custom 4 Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

What does it do?

Removes contacts with email addresses that do not match the email address in the signature block.

Recommendation:

If you notice that a large number of contacts do not include an email address in their signature blocks, disabling this filter is recommended.

What is It?

Intapp: No Company Filter

Name: Intapp: No Company Override Reservations Frequency: None

Type	Calculation	Comparison	Value	Active
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Company name	Choose One	Is empty	Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

Add row Cancel Save

What does it do?

Removes contacts with no company.

Recommendation:

Because some companies include a company name as an image in signature blocks which cannot be recognized as text, disabling this filter is recommended.

What is It?

Intapp: No Email Address Filter

Name: Intapp: No Email Address Override Reservations Frequency: None

Type	Calculation	Comparison	Value	Active
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Email	Choose One	Is empty	Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

Add row Cancel Save

What does it do?

Removes contacts without email addresses.



What is It?

Intapp: No First Name Filter

Name: Override Reservations Frequency:

Type	Calculation	Comparison	Value	Active
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation <input type="text" value="First Name"/>	<input type="text" value="Choose One"/>	<input type="text" value="Is empty"/>	<input type="text" value="Select"/>	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation <input type="text" value="Choose One"/>	<input type="text" value="Choose One"/>	<input type="text" value="Contains"/>	<input type="text" value="Select"/>	<input type="checkbox"/>

What does it do?

Removes contacts without a first name.

What is It?

Intapp: No Last Name Filter

Name: Override Reservations Frequency:

Type	Calculation	Comparison	Value	Active
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation <input type="text" value="Last Name"/>	<input type="text" value="Choose One"/>	<input type="text" value="Is empty"/>	<input type="text" value="Select"/>	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation <input type="text" value="Choose One"/>	<input type="text" value="Choose One"/>	<input type="text" value="Contains"/>	<input type="text" value="Select"/>	<input type="checkbox"/>

What does it do?

Removes contacts without a last name.



What is It?

Intapp: No Received By Filter

Name: Intapp: No received by Override Reservations Frequency: None

Type	Calculation	Comparison	Value	Active
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation CMC Custom 1	Choose One	Is empty	Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

What does it do?

Removes contacts with no received by email address.

What is It?

Intapp: Repeated Words in Company Filter

Name: Intapp: Repeated Words in Company Override Reservations Frequency: None

Type	Calculation	Comparison	Value	Active
<input type="radio"/> CRM Field <input type="radio"/> Metadata Field <input checked="" type="radio"/> CRM Field Calculation Company name	Repeated words	Is greater than	2 Select	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> CRM Field <input type="radio"/> Metadata Field <input type="radio"/> CRM Field Calculation Choose One	Choose One	Contains	Select	<input type="checkbox"/>

What does it do?

Removes contacts with companies that contain the same word two or more times. The number can be edited.