



Intapp Customer Community Guide

Homepage

1. Search bar
2. Navigation menu
3. User Profile and settings
4. Community news stories
5. News feed
6. Quicklinks

The screenshot displays the Intapp Customer Community homepage. At the top, a dark blue header contains the Intapp logo, a search bar (1), a user profile icon (3), and a navigation menu (2) with links for Home, Support, Products, Community Groups, Intapp University, Software Downloads, and Community Help. Below the header, a large dark blue banner welcomes users to the community, describing it as a one-stop shop for connecting with the Intapp team, partners, and other customers. It lists activities such as solving product problems, finding more about products, connecting with peers, and downloading new software. A row of three featured articles (4) follows: 'Welcome To Our New Community', 'Learn More About Our Common Release Schedule', and 'Download Our Latest Software'. Below these is a news feed (5) showing posts from 'Walls (Private)' and 'Experience (Private)'. On the right side, a 'Quicklinks' section (6) provides direct access to support tickets, product groups, documentation, training, courses, events, horizons, cloud status, and the home page. At the bottom of the quicklinks section, contact information is provided for Intapp University courses, Intapp Customer Events, and general support.

intapp
Customer Community

Search

Home Support Products Community Groups Intapp University Software Downloads Community Help

Welcome to the Intapp Customer Community. The community is a one-stop shop where you can connect with the Intapp team, our partners and with other customers.

This is your place to find and share expertise and information, including:

- Solve product problems by searching for answers or raising a case
- Find out more about our products and services, and share your product feedback and requests
- Connect with your peers and share your expertise and best practices
- Download new software

Welcome To Our New Community

Learn More About Our Common Release Schedule

Download Our Latest Software

Sort by: Latest Posts Search this feed...

Walls (Private) — (Customer)

May 8, 2019 at 3:33 PM

Like Comment

Write a comment...

Experience (Private) — (Intapp)

April 16, 2019 at 10:40 PM

Experience

Like Comment

Quicklinks

- Support Tickets
- Your Product Groups
- Product Documentation
- Instructor Led Training
- eLearning Courses
- Customer Events
- Horizons
- Intapp Cloud Status
- Intapp Home

For questions about **Intapp University** courses, please contact customertraining@intapp.com

For questions on **Intapp Customer Events**, please contact events@intapp.com

For **Support** questions, please contact support@intapp.com

Homepage: Search

- Type your search query in the search bar and press Enter – you'll see search results from articles, discussions, groups, files and more
- Click the menu on the left-hand side to filter on a specific content type – for example if you only want to see results of articles containing your search term

The screenshot shows the Intapp Community homepage with a search bar at the top containing the text "partners". Below the search bar is a navigation menu with links: Home, Support, Products, Community Groups, Intapp University, Software Downloads, and Community Help. The main content area displays search results for "partners". On the left, there is a "Search Results" sidebar with a filter menu showing "All" (selected), Discussions, Articles, Groups, Topics, Cases, and Files, along with a "Collapse List" button. The main results area is divided into three sections: "Articles", "Topics", and "Cases". Each section shows a list of results with titles, dates, and descriptions. The "Articles" section includes results like "On-demand and event driven notification field codes" and "Introducing the Wall Builder Generic Extension". The "Topics" section includes "Office Hours For Partners", "Intapp Open Cloud Training For Partners", "Re-Certification Test For Partners", "Hi Partners", and "WALLS Partners". The "Cases" section shows a table with columns: CASE NUMBER, OWNER NAME, ACCOUNT NAME, CASE RECORD TYPE, and SUBJECT. The table lists several cases related to "Intapp Open Cloud Training For Partners".

Search Results

Articles
5+ Results • Sorted by Relevance ▾ [View More](#)

On-demand and event driven notification field codes
000001987 • Last Modified: Dec 5, 2013 9:49 AM
administrators: Billing Lawyer , Delegated Administrator, Matter Manager, Matter **Partner**

Introducing the Wall Builder Generic Extension
000001621 • Last Modified: Mar 26, 2013 11:26 AM
Intapp Open Cloud Training For Partners

NetDocuments 18.3 and OAuth Updates
000004230 • Last Modified: Sep 16, 2018 9:45 AM
NetDocuments extension can continue to work as expected. Intapp has **partnered** with NetDocuments to ensure

Document exceptions
000002267 • Last Modified: Jun 23, 2014 3:17 PM
partner might have billed time to one side of a wall and edited a document on another side of a wall

Integrated Corporate Data Services
000003431 • Last Modified: Oct 5, 2016 8:07 AM
partnered with the leading providers to ensure Intapp Open could integrate with those valuable sources

Topics
5+ Results • Sorted by Relevance ▾ [View More](#)

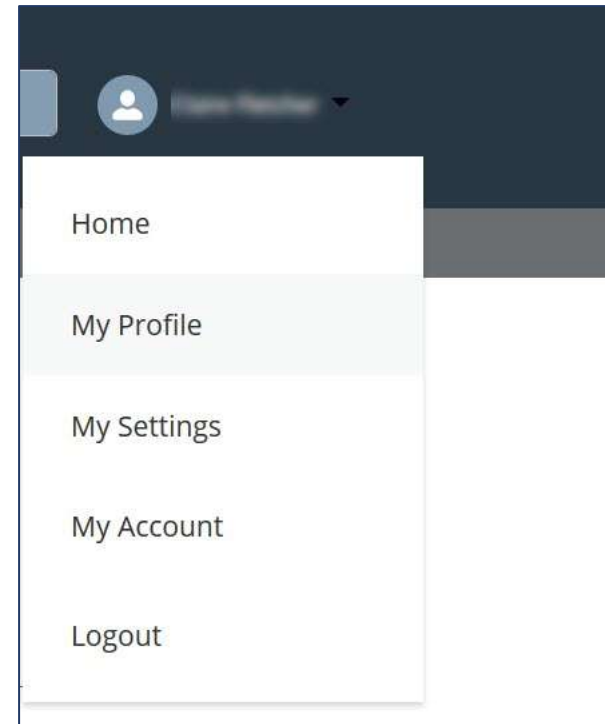
NAME	DESCRIPTION
Office Hours For Partners	
Intapp Open Cloud Training For Partners	
Re-Certification Test For Partners	
Hi Partners	
WALLS Partners	

Cases
5+ Results • Sorted by Relevance ▾ [View More](#)


CASE NUMBER	OWNER NAME	ACCOUNT NAME	CASE RECORD TYPE	SUBJECT
000000000	Intapp Open Cloud Training For Partners	Intapp Open Cloud Training For Partners	Open	Intapp Open Cloud Training For Partners
000000000	Intapp Open Cloud Training For Partners	Intapp Open Cloud Training For Partners	Open	Intapp Open Cloud Training For Partners
000000000	Intapp Open Cloud Training For Partners	Intapp Open Cloud Training For Partners	Open	Intapp Open Cloud Training For Partners

User Profile and Settings

- Click on your name in the top-right hand corner to open the user menu
- Access your profile and change your settings from here



User Profile and Settings



Harvey Specter
Customer

Name

Harvey Specter

Company Name

About Me

Edit

User can edit

Integrate Certified

☐

Time Certified

☐

Open Certified

☐

Walls Certified

☐

Read Only

Feed

Post

Poll

Share an update...

Share

Most Recent Activity ▾

Q Search this feed

▼

↻

Will show the list of post made in the groups section of the community

Nothing here yet?

Write a post and see what happens!

Influence Based on participation in the community

1 Beginner (7 points)

Following

0

Followers

0

Posts

0

Comments

0

Likes

0

Team

▼

Files

mobility

Jul 19, 2017 • 113KB • png

Files that user have posted in the groups section

View All

Groups the User belongs to

Integrate

582

Walls

619

View All

User Profile and Settings

The screenshot displays a user interface for 'My Settings'. On the left, a navigation menu for 'Harvey Sp...' includes 'Home', 'My Profile', 'My Settings' (highlighted with an orange box), and 'Logout'. An orange arrow labeled 'Change Password' points to the 'Change Password' link in the 'Account' section. The 'Account' section contains fields for 'Username' (harveys@pearsonspecter.io.intapp) and 'Email Address *' (harveys@pearsonspecter.io). Below this is the 'Location' section with dropdowns for 'Language' (English), 'Locale' (English (United States)), and 'Time Zone' ((GMT-07:00) Pacific Daylight Time (America/Los_Angeles)). The 'Profile Visibility' section shows a 'Photo' dropdown set to 'Members'. An orange arrow labeled 'Controls Email Notifications' points to the 'Email Notifications' section, which is highlighted with an orange box. This section includes a 'Receive emails' checkbox (checked) and a list of notification preferences, all of which are checked: 'Follows me', 'Comments on my posts', 'Comments after me', 'Comments on an item I like', 'Mentions me in a comment', 'Likes a post or a comment I made', 'Comments on a post on my profile', 'Comments on an item I bookmarked', and 'Mentions me in a post'. A text box at the bottom left explains: 'Put a check mark to enable, remove the check mark to disable'.

My Settings Cancel Save

Account

Username
harveys@pearsonspecter.io.intapp

Email Address *
harveys@pearsonspecter.io

Password
[Change Password](#)

Location

Language
English

Locale
English (United States)

Time Zone
(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Profile Visibility

Customize who is able to see what on your profile page ⓘ

Photo
Members

Controls Email Notifications

Put a check mark to enable, remove the check mark to disable

Email Notifications

☒ Receive emails

When email notifications are enabled, email me when someone:

☒ Follows me ☐ Likes a post or a comment I made

☒ Comments on my posts ☒ Comments on a post on my profile

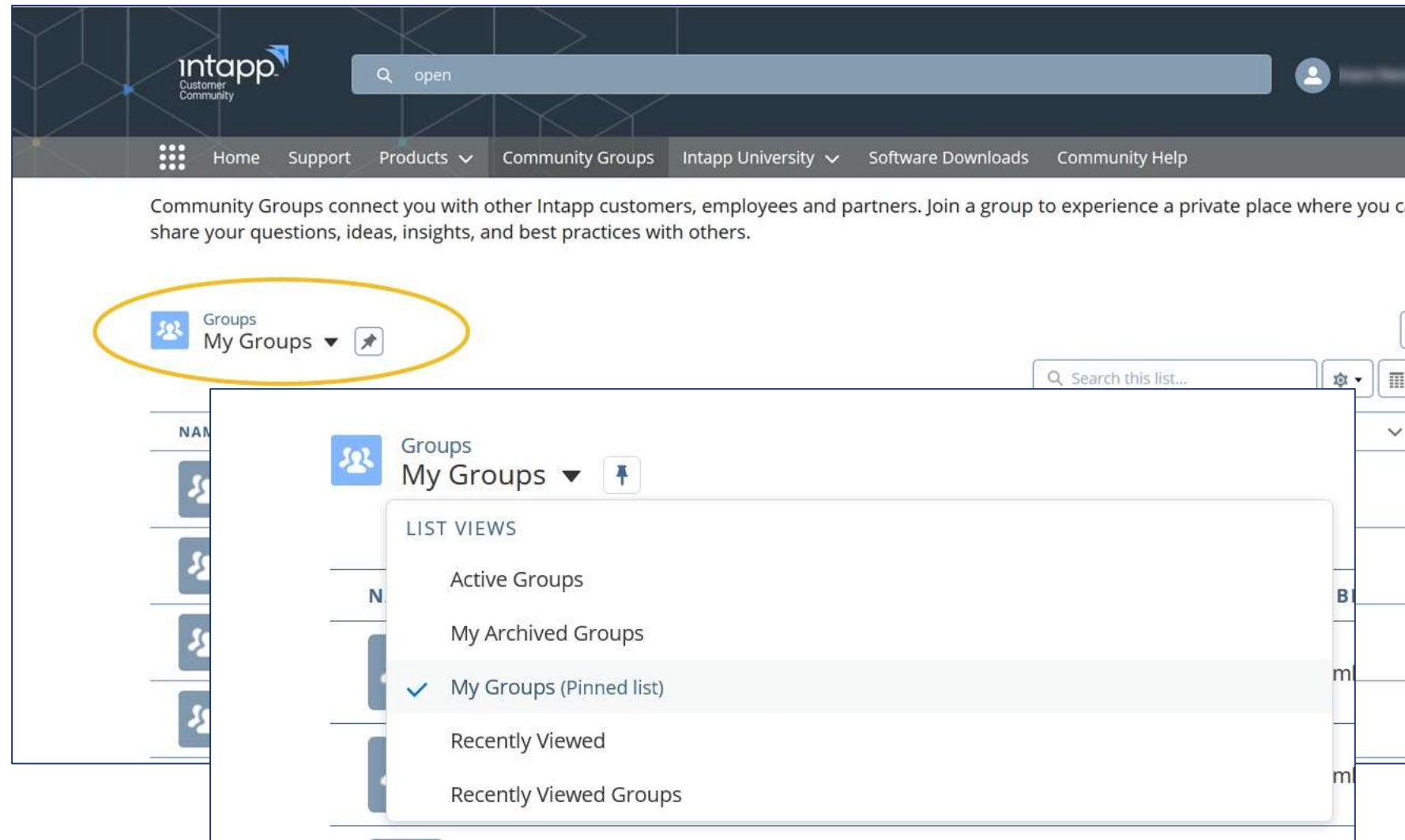
☒ Comments after me ☒ Comments on an item I bookmarked

☒ Comments on an item I like ☒ Mentions me in a post

☒ Mentions me in a comment

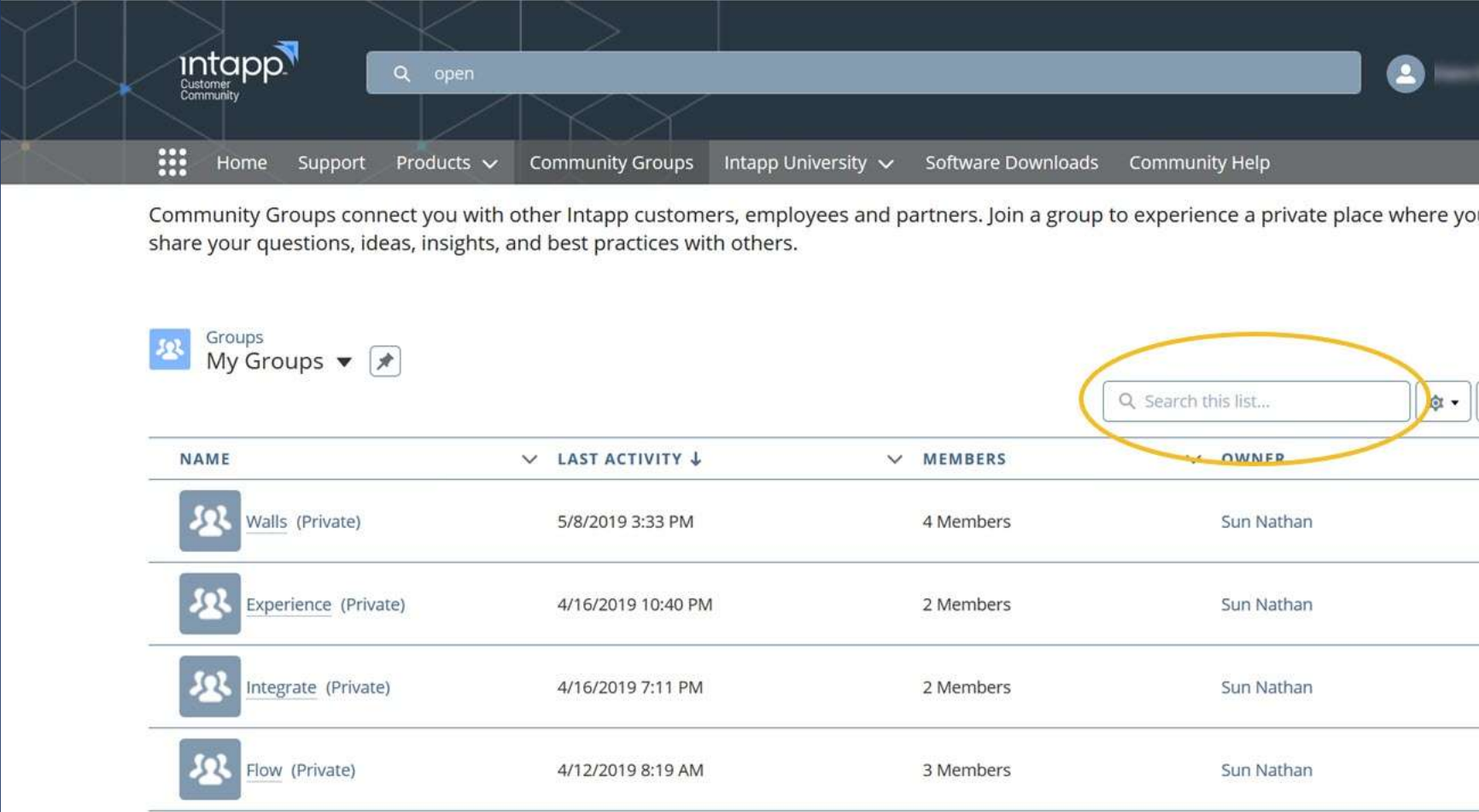
Groups: Finding a group

- Click on the arrow to choose which view of the available groups you see
- You can choose to 'pin' the view that you use most often - in this example **My Groups** has been pinned so it will always be the default list on this page







Groups: Finding a group

- You can also search for groups if there's a particular group you're looking for – for example a virtual local user group for your area



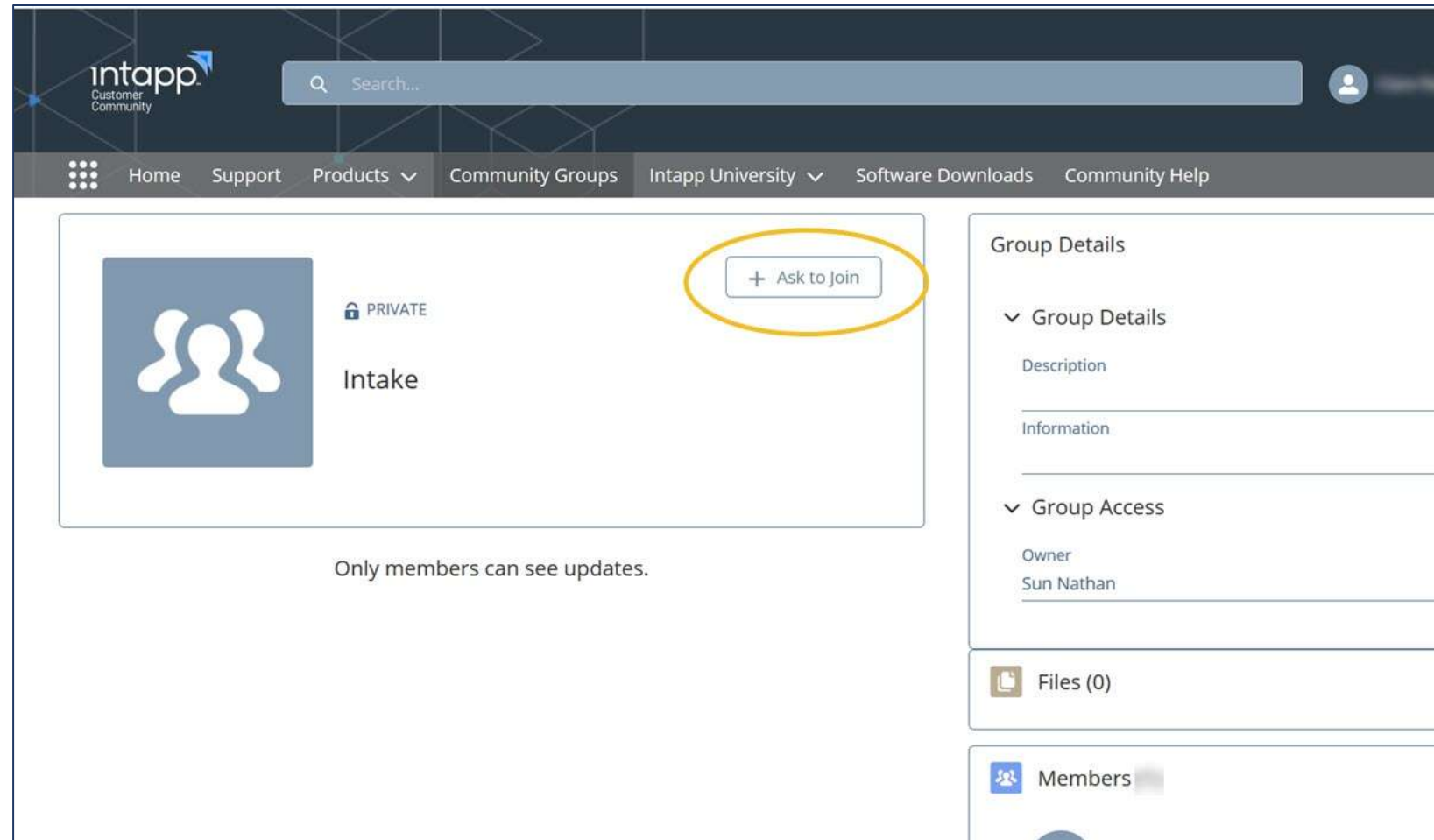
The screenshot shows the Intapp Customer Community interface. At the top, there's a navigation bar with the Intapp logo and a search bar labeled 'open'. Below the navigation bar, there's a section titled 'Community Groups' with a description: 'Community Groups connect you with other Intapp customers, employees and partners. Join a group to experience a private place where you share your questions, ideas, insights, and best practices with others.'

Below the description, there's a section for 'Groups' with a 'My Groups' dropdown and a search bar labeled 'Search this list...'. The search bar is highlighted with a yellow circle.

NAME	LAST ACTIVITY	MEMBERS	OWNER
 Walls (Private)	5/8/2019 3:33 PM	4 Members	Sun Nathan
 Experience (Private)	4/16/2019 10:40 PM	2 Members	Sun Nathan
 Integrate (Private)	4/16/2019 7:11 PM	2 Members	Sun Nathan
 Flow (Private)	4/12/2019 8:19 AM	3 Members	Sun Nathan

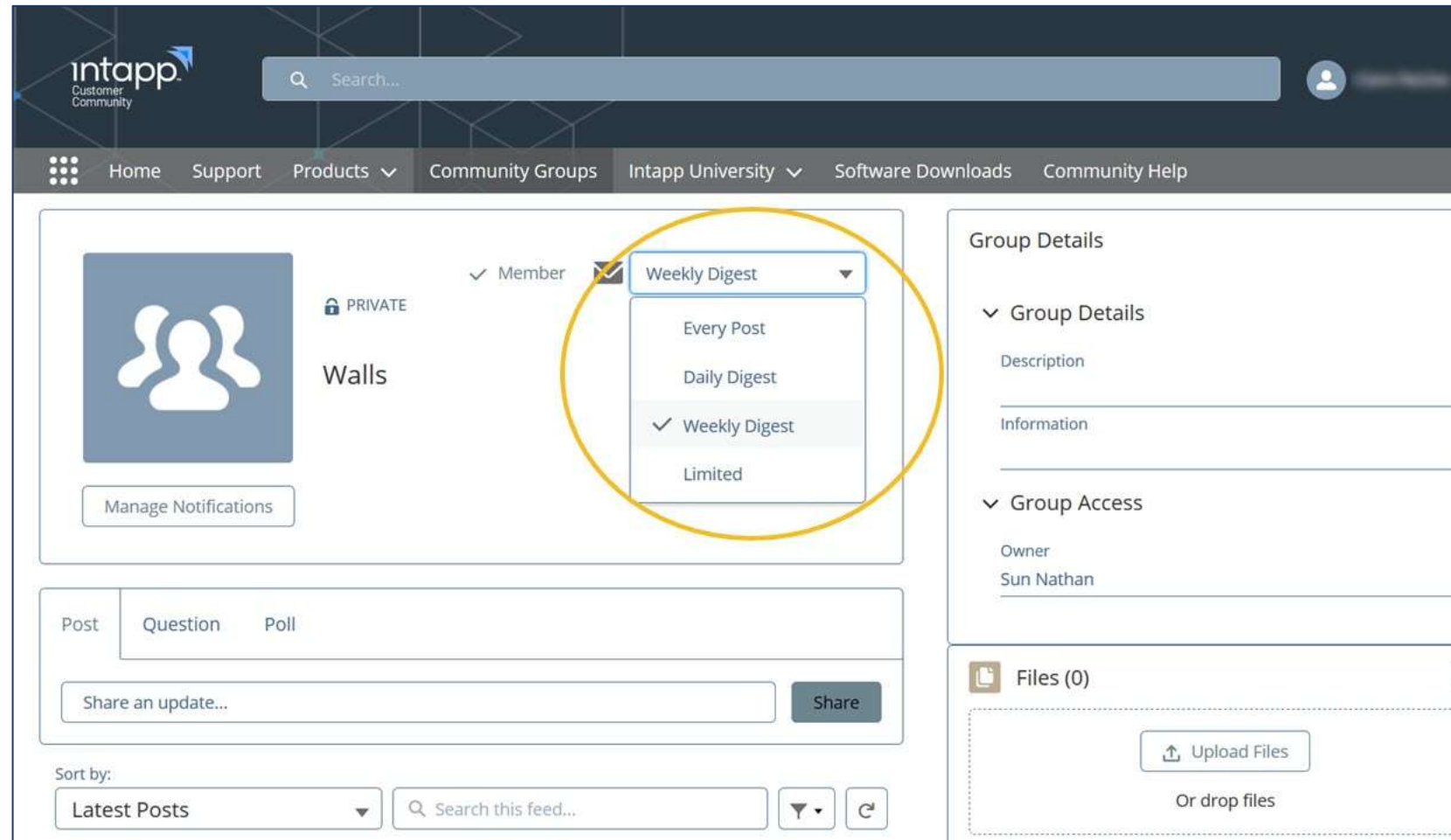
Groups: Joining a group

- If you find a private group that you'd like to join, click the **Ask to join** button



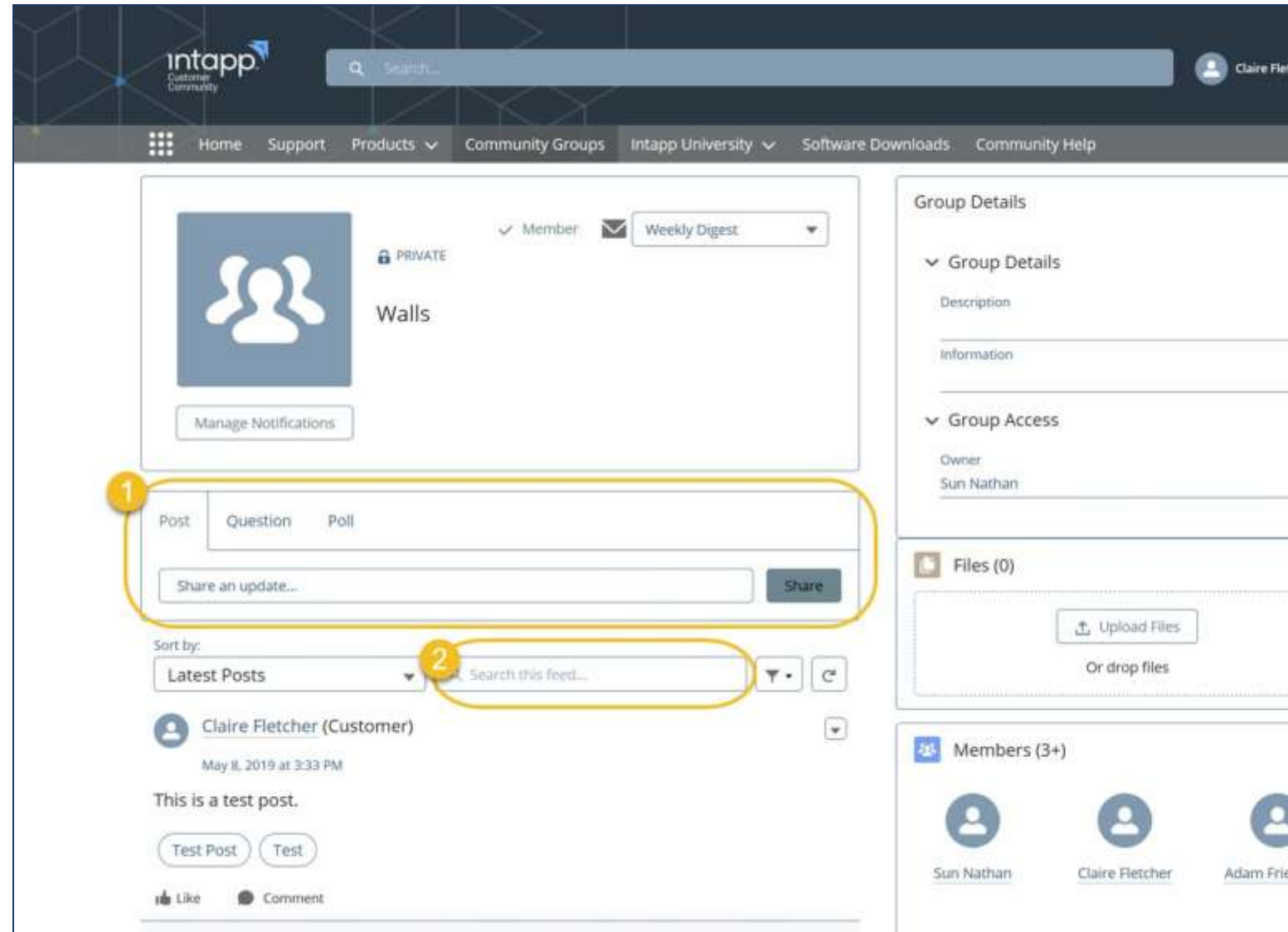
Groups: Group notifications

- Click the menu next to the mail icon to choose how often you receive notifications about activity in the group
- The default is to receive a weekly digest



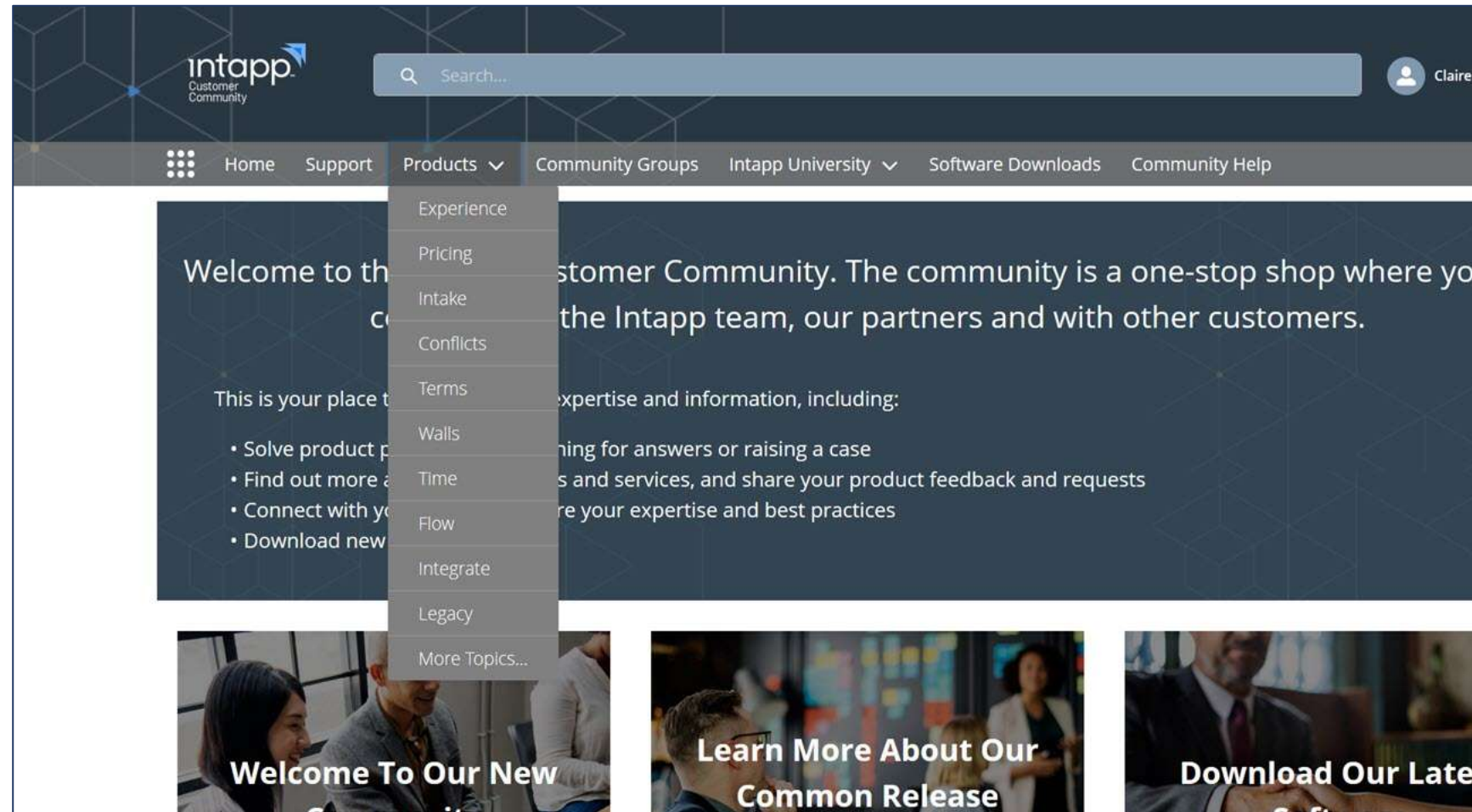
Groups: Participating in a group

1. Click **Post**, **Question** or **Poll** to choose the type of content you want to add. Add your text and click **Share** or **Ask** to post your item in the group
2. Search here to search content posted only in this group



Products

- Click on the Products menu to navigate to a specific product



Products

On each product page you'll find:

1. Related knowledge articles
2. Ideas
3. A link to relevant groups

The screenshot shows the Intapp Customer Community interface. The top navigation bar includes the Intapp logo, a search bar, and a user profile for Claire Fletcher. The main navigation menu contains links for Home, Support, Products (selected), Community Groups, Intapp University, Software Downloads, and Community Help. The page title is 'Walls'. On the left, two callouts labeled '1' and '2' point to 'Articles' and 'Ideas' tabs respectively. The main content area lists several articles related to 'Walls 6.5: Client Teams' and 'Intapp Information on Meltdown and Spectre Vulnerabilities'. On the right, a callout labeled '3' points to a 'Groups related to this topic' section, which includes a 'Walls' group. Below this is a 'Leaderboard' section listing top contributors like Kyle Thomas, Ian Gaston, Bob Fishel, Dale Kiwanasa, and Marya Hillard with their respective point counts. At the bottom right, a note directs users to a guide for navigating the community.

intapp
Customer Community

Search

Claire Fletcher

Home Support Products Community Groups Intapp University Software Downloads Community Help

Walls

1 Articles 2 Ideas

Articles With This Topic

Missing Visual C++ - Redistributable for Visual Studio 2015
Correcting visual studio exceptions in the extension service logs
2 Views · Aug 2, 2018 · Knowledge Base

Missing Visual C++ Redistributable for Visual Studio 2015
0 View · Aug 2, 2018 · Troubleshooting

Walls 6.5: Client Teams
26 Views · Jun 6, 2018 · Knowledge Base

Using Client Teams with Walls 6.5
25 Views · Mar 6, 2018 · General Information

Intapp Information on Meltdown and Spectre Vulnerabilities
242 Views · Jan 5, 2018 · Knowledge Base

Relocate the Walls Database to a new SQL Server
186 Views · Jun 27, 2017 · Knowledge Base

Groups related to this topic

Walls

Leaderboard

Kyle Thomas	Expert	1281 Points
Ian Gaston	Expert	931 Points
Bob Fishel	Expert	747 Points
Dale Kiwanasa	Expert	651 Points
Marya Hillard	Expert	571 Points

For information on how to navigate the Intapp Customer Community, please check our Guide.

Product ideas

The screenshot shows the 'Product Ideas' interface. At the top, there are tabs for 'Articles' and 'Ideas'. Below the 'Ideas' tab, there's a search bar and a 'Post Your Idea' button. A sidebar on the left contains filters for 'Show' (All, My ideas, Commented by me) and 'Category' (All, Intapp Flow, Intapp Time, Intapp Time Cloud, Integration, Intapp Open Conflicts, Intapp Open Intake). The main content area displays two ideas: 'Allow configuration of collapsible sections on the form' by Yvette Hetherington and 'Reusable Form Sections' by Eric Mosca. A leaderboard on the right lists top contributors. Annotations include: 'To filter Ideas' pointing to the sidebar, 'To search for Ideas' pointing to the search bar, 'To post an Idea' pointing to the 'Post Your Idea' button, and 'To up vote or down vote an Idea' pointing to the vote buttons on the first idea.

Articles **Ideas**

To filter Ideas

To search for Ideas

To post an Idea

Ideas | 367 ideas

Popular ▼ Post Your Idea

Leaderboard

1.		Bob Fishel 3 Expert	415 Points
2.		Dana Marder 3 Expert	307 Points
3.		Bob Tutt 2 Intermediate	187 Points
4.		Dan Raisbeck 2 Intermediate	177 Points
5.		Curt Russell 2 Intermediate	156 Points

Don't see what you're looking for?
Click on the groups tab to ask a question!

Show ^

- All
- My ideas
- Commented by me

Category ^

- All
- Intapp Flow
- Intapp Time
- Intapp Time Cloud
- Integration
- Intapp Open Conflicts
- Intapp Open Intake

Yvette Hetherington
170 points

Allow configuration of collapsible sections on the form
Intapp Open Intake

Would like to be able to configure which sections on the form are expanded rather than the default of being collapsed. Currently only the first section is expanded by default. For example, if a request is waiting to be authorised by a partner and they need to provided some details, but that

May 4, 2017 • 2 comments

Eric Mosca
160 points

Reusable Form Sections
Intapp Open Intake

Shearman & Sterling has a very complicated "section" of a form containin 400 questions and detailed display conditions. This encapsulated process needs to be leveraged by multiple

Product ideas: Posting an idea

Articles **Ideas** To post an Idea

Ideas | 367 ideas

Popular Post Your Idea

Post an Idea

Title*

Category*

- Choose category -

Description

Salesforce Sans 12

* - required fields

Cancel Post

- Choose category -
- Intapp Flow
- Intapp Time
- Intapp Time Cloud
- Integration
- Intapp Open Conflicts
- Intapp Open Intake
- Intapp Walls
- LegalKey
- CompliGuard Analyze
- CompliGuard Flow
- CompliGuard Protect
- Intapp Open Terms
- Intapp Open Experience

Support

Support Products Groups

Intapp Customer Community

Support Cases

Contact Support

Open Cases

List of open cases for the firm

Page 1 of 1

Closed Cases

List of closed cases for the firm