



## Intapp Customer Community Guide

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# 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 (1), a search bar (1), and a user profile icon with a dropdown menu (3). Below the header is a navigation menu (2) with links for Home, Support, Products, Community Groups, Intapp University, Software Downloads, and Community Help. The main content area features a large blue banner with a welcome message and a list of community benefits. Below this are three featured articles (4) with images and titles: 'Welcome To Our New Community', 'Learn More About Our Common Release Schedule', and 'Download Our Latest Software'. The bottom section (5) shows a news feed with a 'Sort by' dropdown set to 'Latest Posts', a search bar for the feed, and two posts. The first post is from 'Walls (Private)' (Customer) dated May 8, 2019. The second post is from 'Experience (Private)' (Intapp) dated April 16, 2019. On the right side, a 'Quicklinks' section (6) lists various resources like Support Tickets, Product Groups, and Training, along with contact information for Intapp University, Customer Events, and 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

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](mailto:customertraining@intapp.com)

For questions on **Intapp Customer Events**, please contact [events@intapp.com](mailto:events@intapp.com)

For **Support** questions, please contact [support@intapp.com](mailto: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 Customer Community homepage with a search bar at the top containing the query "partners". The navigation menu includes Home, Support, Products, Community Groups, Intapp University, Software Downloads, and Community Help. The search results are displayed on the right, filtered by "Articles" and "Topics". The left sidebar shows a "Search Results" menu with options for All, Discussions, Articles, Groups, Topics, Cases, and Files, along with a "Collapse List" button.

**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  
[redacted] will be used to implement the security contained in the

NetDocuments 18.3 and OAuth Updates  
000004220 • Last Modified Sep 18, 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](#)

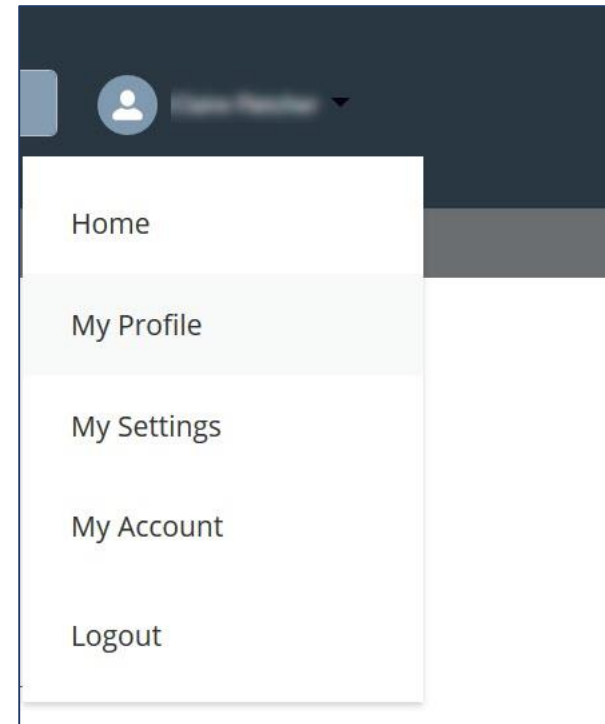
| NAME                                    | DESCRIPTION |
|---|-------------|
| Office Hours For Partners               |             |
| Intapp Open Cloud Training For Partners |             |
| Re-Certification Test For Partners      |             |
| Hi Partners                             |     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

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


| CASE NUMBER | OWNER NAME     | ACCOUNT NAME           | CASE RECORD TYPE | SUBJECT                     |
|-------------|----------------|------------------------|------------------|-----------------------------|
| 00000000    | Legal Services | Microsoft & Google LLC | Support          | How to use the Wall Builder |
| 00000000    | Legal Services | Microsoft & Google LLC | Support          | How to use the Wall Builder |
| 00000000    | Legal Services | Microsoft & Google LLC | Support          | How to use the Wall Builder |

# 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

User can edit

Integrate Certified

Time Certified

Open Certified

Walls Certified

Read Only

Edit

Influence

Based on participation in the community

1 Beginner (7 points)

|           |           |       |
|-----------|-----------|-------|
| Following | Followers |       |
| 0         | 0         |       |
| Posts     | Comments  | Likes |
| 0         | 0         | 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

Groups

Integrate

582

Walls

619

View All

Feed

Post

Poll

Share an update...

Share

Most Recent Activity

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!

# User Profile and Settings

The screenshot displays a user interface for managing a profile. 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 'My Settings' page is divided into sections: 'Account' (with fields for Username, Email Address, Password, and a 'Change Password' link), 'Location' (with dropdowns for Language, Locale, and Time Zone), and 'Profile Visibility' (with a 'Photo' dropdown set to 'Members'). A yellow box highlights the 'Email Notifications' section, which includes a 'Receive emails' checkbox and a list of notification preferences. An orange arrow points from the text 'Controls Email Notifications' to this section. Below this text, instructions state: '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

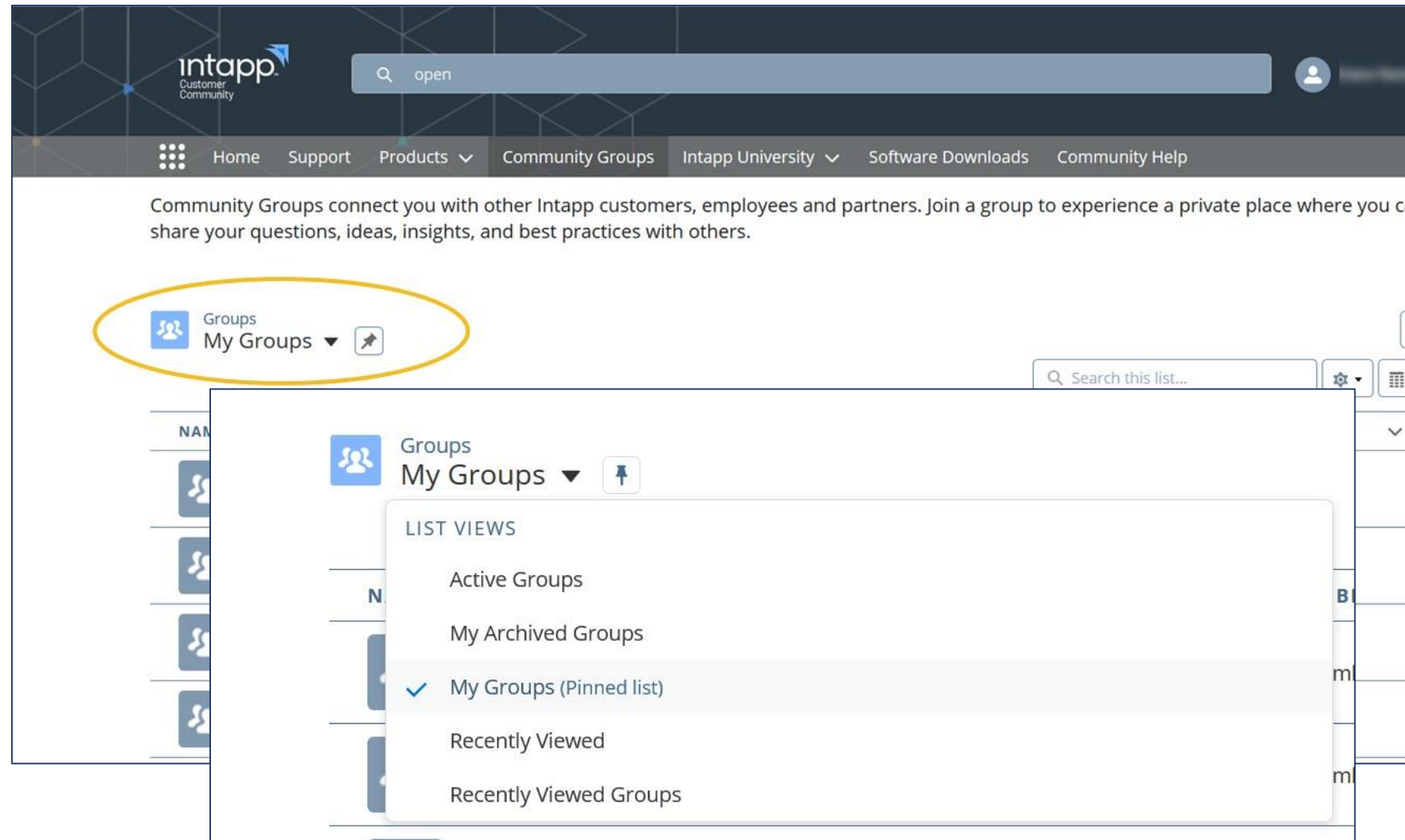
☒ Comments after me ☒ Comments on an item I bookmarked

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

☒ Mentions me in a comment

# Groups: Finding a group

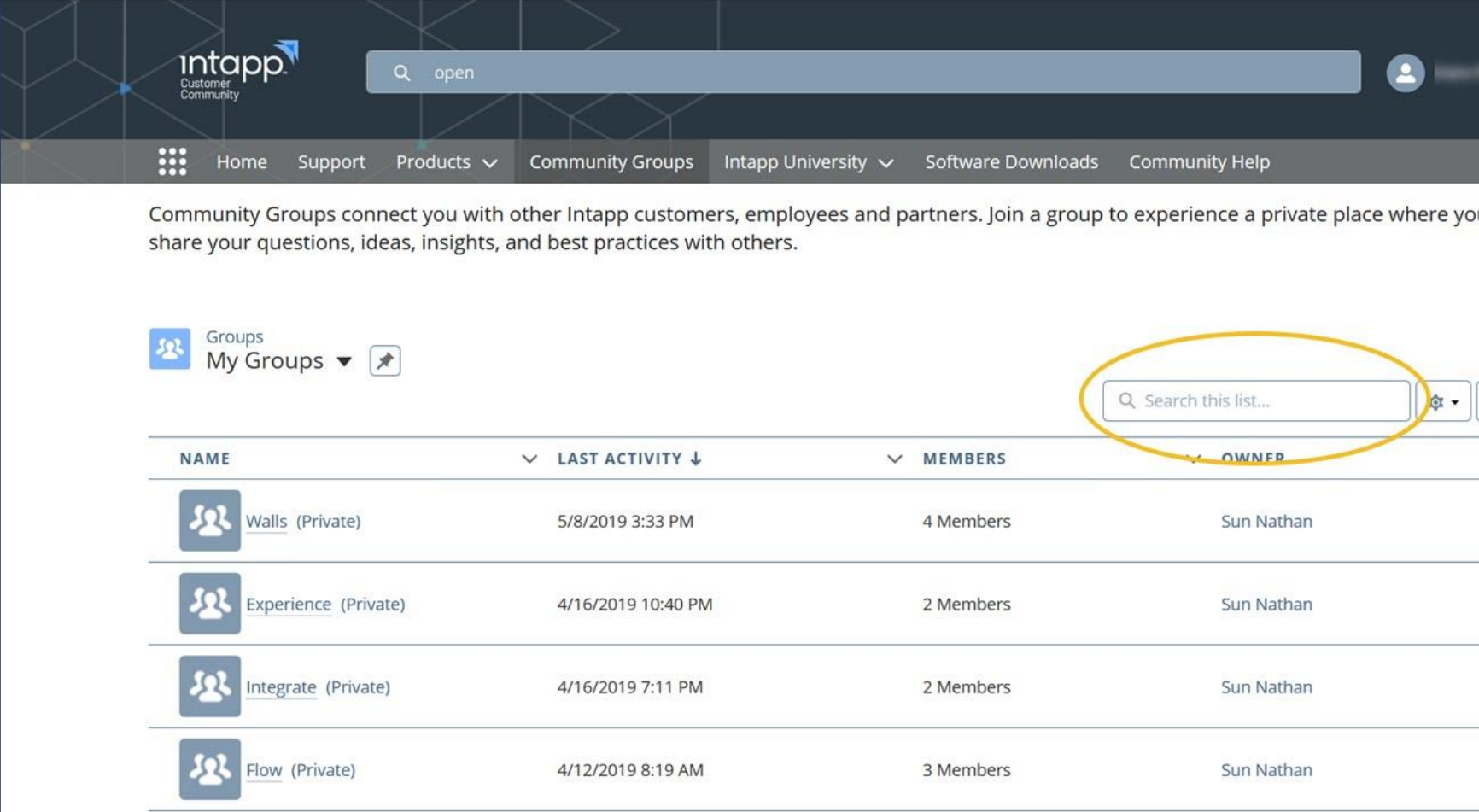
- Click on the arrow to choose which view of the available groups you see
- You can choose to 'pin' the view that you use most often - in this example **My Groups** has been pinned so it will always be the default list on this page









# 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 can share your questions, ideas, insights, and best practices with others."

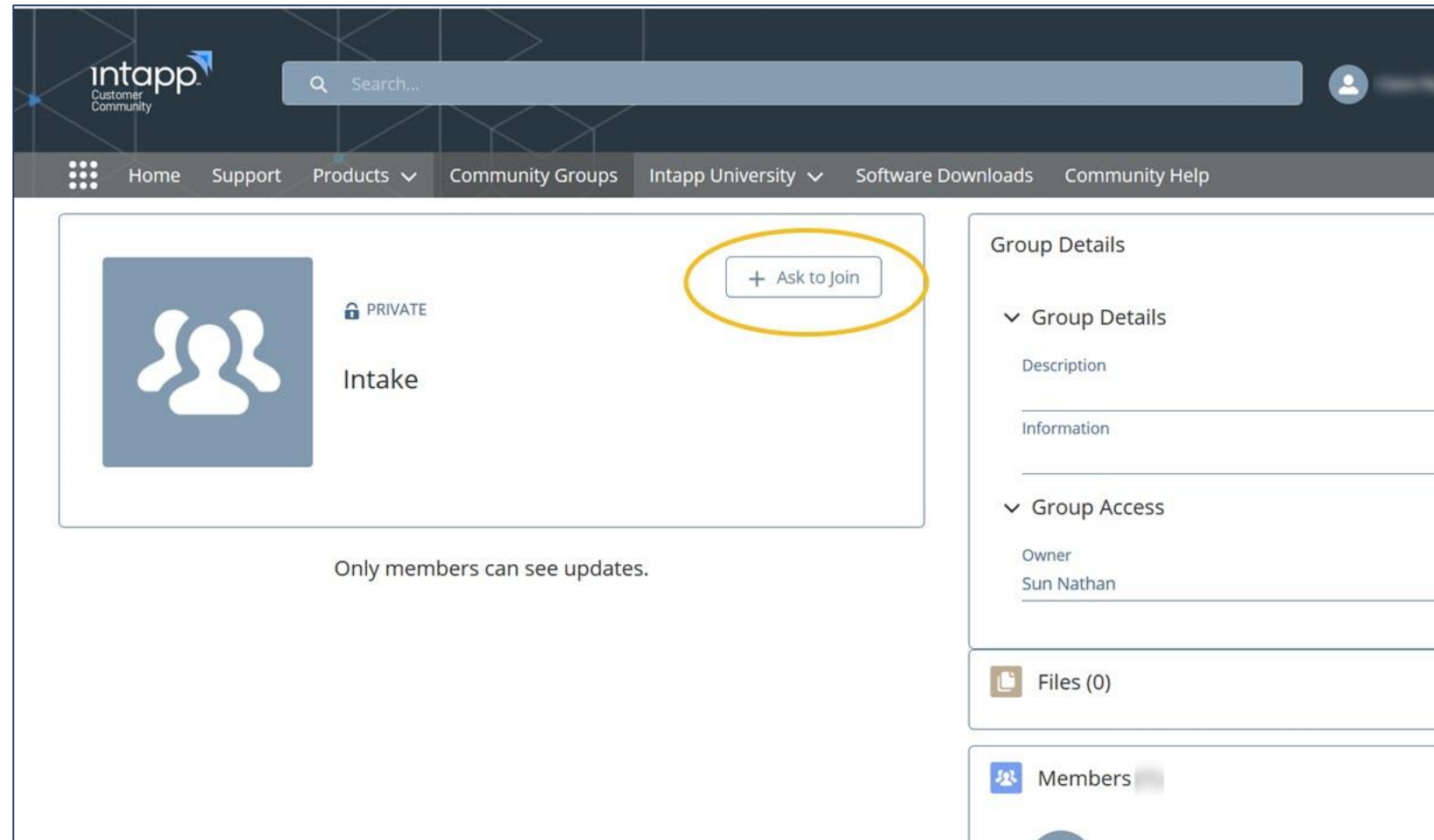
Below the description, there's a "Groups" section with a "My Groups" dropdown and a search bar labeled "Search this list...". The search bar is highlighted with a yellow circle. Below the search bar, there's a table listing groups.

| 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 |



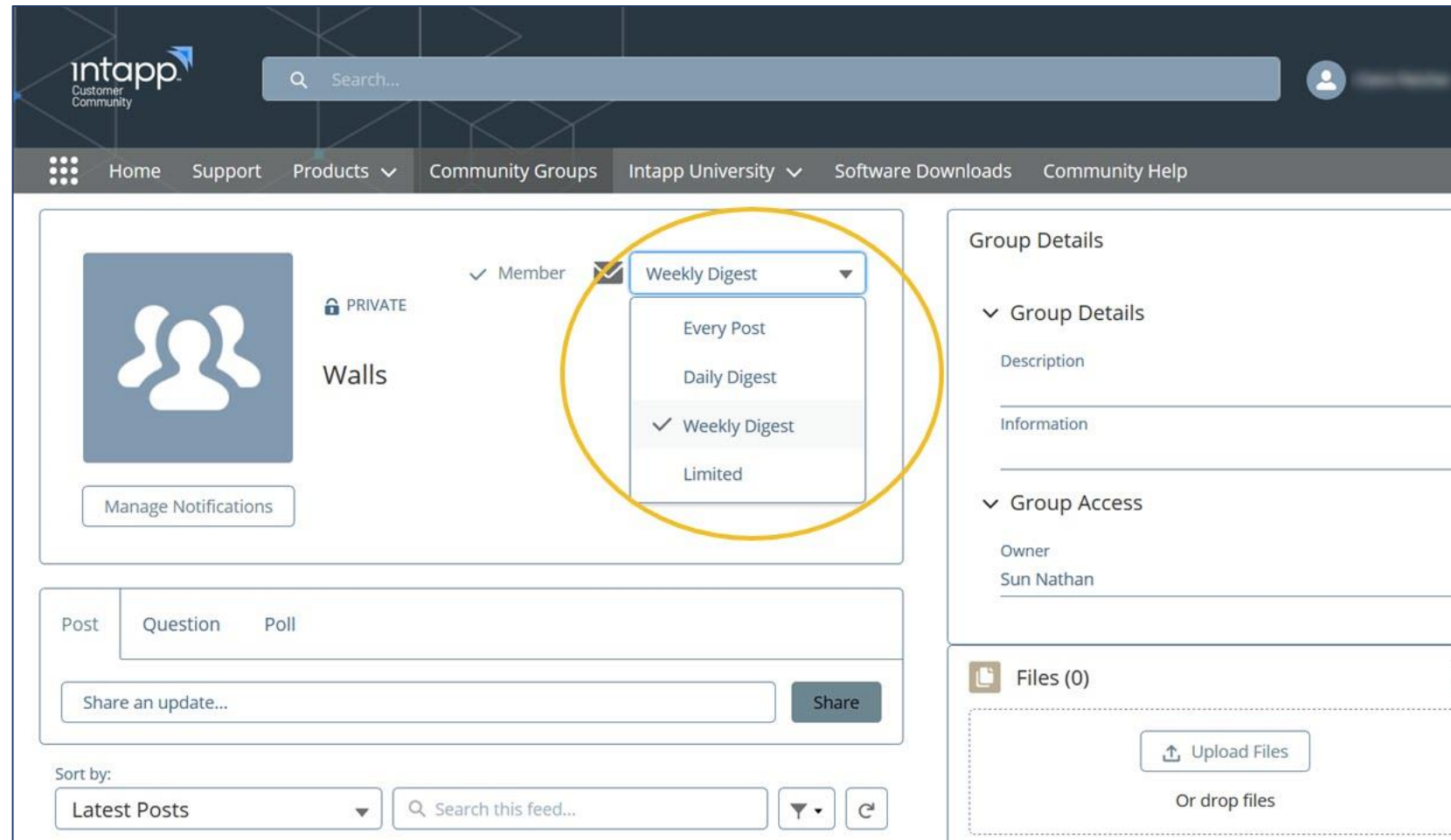
# Groups: Joining a group

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



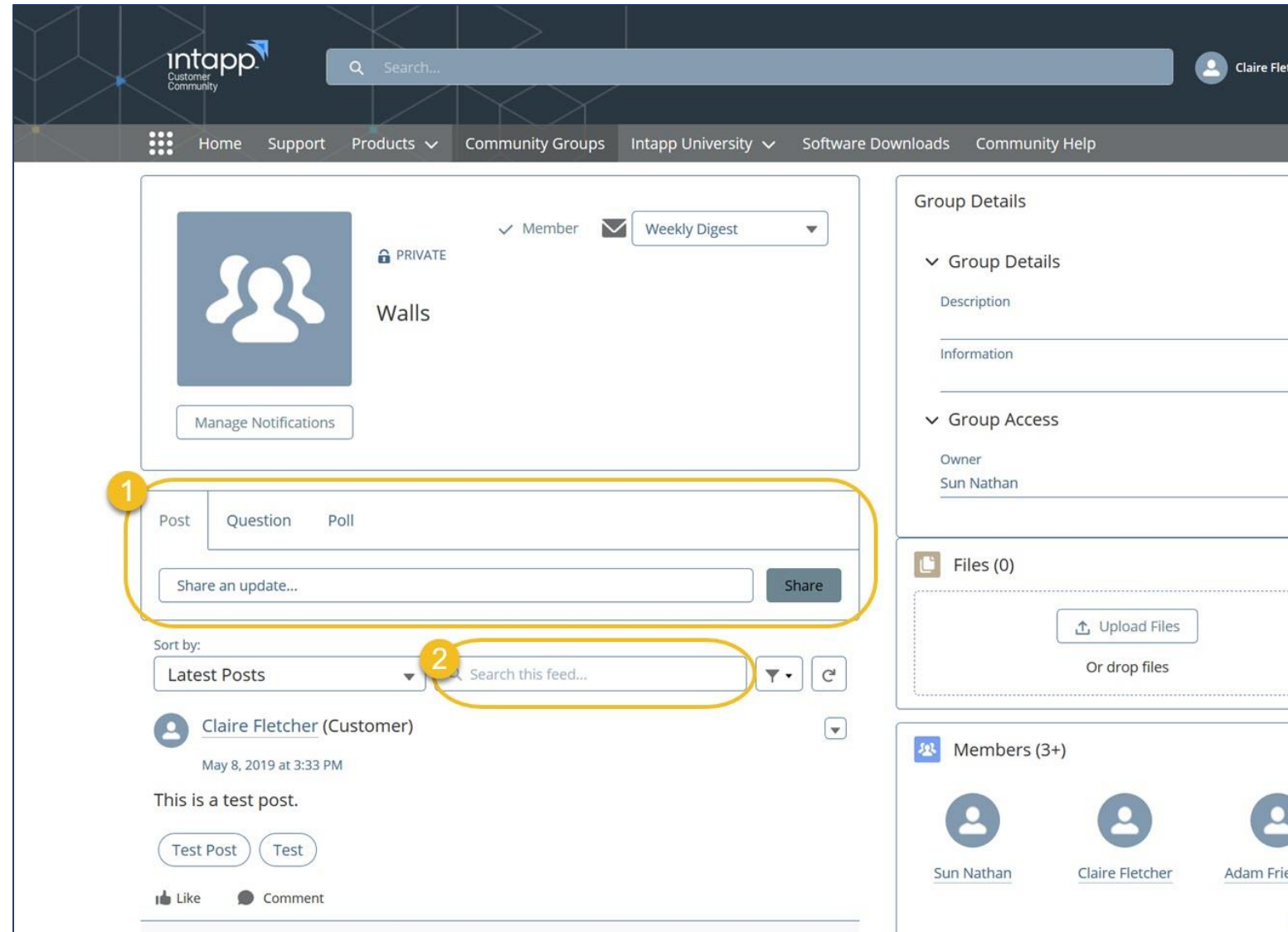
# Groups: Group notifications

- 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



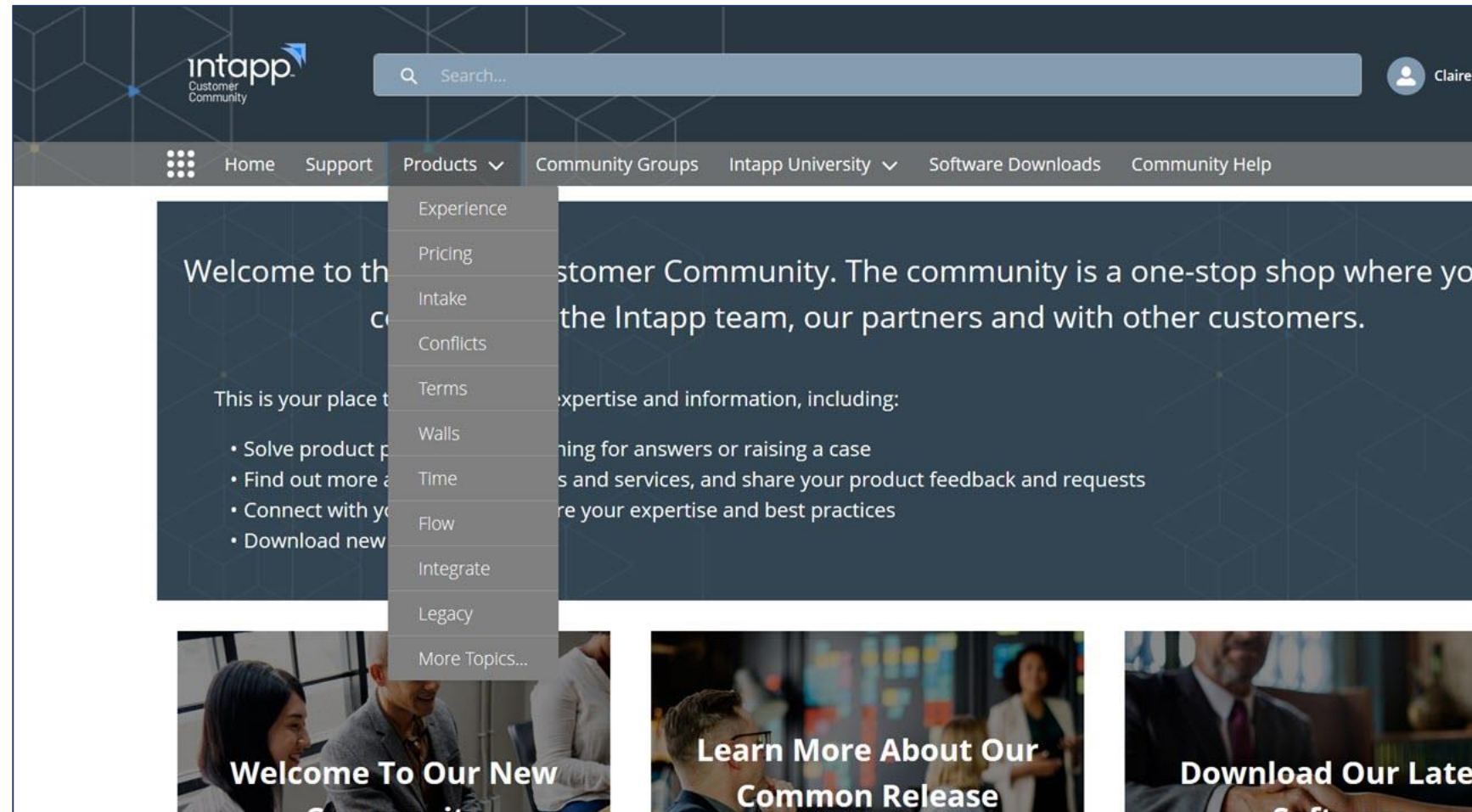
# Groups: Participating in a group

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 has links for Home, Support, Products (selected), Community Groups, Intapp University, Software Downloads, and Community Help.

The 'Products' page for 'Walls' displays a list of articles. Three callouts highlight key features:

- 1. Articles With This Topic:** A section titled 'Articles With This Topic' showing related knowledge articles. The first article is 'Missing Visual C++ - Redistributable for Visual Studio 2015' with 2 views, dated Aug 2, 2018, from the Knowledge Base. The second article is 'Missing Visual C++ Redistributable for Visual Studio 2015' with 0 views, dated Aug 2, 2018, from the Troubleshooting section.
- 2. Ideas:** A section titled 'Ideas' showing client teams and their usage of Walls 6.5.
- 3. Groups related to this topic:** A section titled 'Groups related to this topic' showing a link to relevant groups.

The 'Leaderboard' section on the right lists top contributors:

| Profile        | Rank | Expert | Points |
|----------------|------|--------|--------|
| Kyle Thomas    | 3    | Expert | 1281   |
| Ian Gaston     | 3    | Expert | 931    |
| Bob Fishel     | 3    | Expert | 747    |
| Dale Kwasnaza  | 3    | Expert | 651    |
| Malya Hilliard | 3    | Expert | 571    |

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



# Product ideas

The screenshot shows a web interface for a product ideas platform. At the top, there are tabs for 'Articles' and 'Ideas', with 'Ideas' being the active tab. Below the tabs, there is a search bar and a 'Post Your Idea' button. A sidebar on the left contains a 'Show' dropdown menu with options like 'All', 'My ideas', and 'Commented by me', and a 'Category' dropdown menu with options like 'All', 'Intapp Flow', 'Intapp Time', 'Intapp Time Cloud', 'Integration', 'Intapp Open Conflicts', and 'Intapp Open Intake'. The main content area displays a list of ideas, each with a user profile picture, name, points, and a description. The first idea is by Yvette Hetherington, titled 'Allow configuration of collapsible sections on the form', with 170 points. The second idea is by Eric Mosca, titled 'Reusable Form Sections', with 160 points. On the right side, there is a 'Leaderboard' section showing a list of top users with their names, levels, and points. Annotations with arrows point to various elements: 'To filter Ideas' points to the sidebar, 'To search for Ideas' points to the search bar, 'To post an Idea' points to the 'Post Your Idea' button, and 'To up vote or down vote an Idea' points to the up and down vote buttons on the first idea.

**Articles** **Ideas**

To filter Ideas

To search for Ideas

Ideas | 367 ideas

Popular ▼

Post Your Idea

To post an Idea

**Leaderboard**

|    |  |                                       |            |
|----|--|---------------------------------------|------------|
| 1. |  | <b>Bob Fishel</b><br>3 Expert         | 415 Points |
| 2. |  | <b>Dana Marder</b><br>3 Expert        | 307 Points |
| 3. |  | <b>Bob Tutt</b><br>2 Intermediate     | 187 Points |
| 4. |  | <b>Dan Raisbeck</b><br>2 Intermediate | 177 Points |
| 5. |  | <b>Curt Russell</b><br>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

To up vote or down vote an Idea

# 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 B I U        

\* - required fields

Cancel Post

- Choose category -

- 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