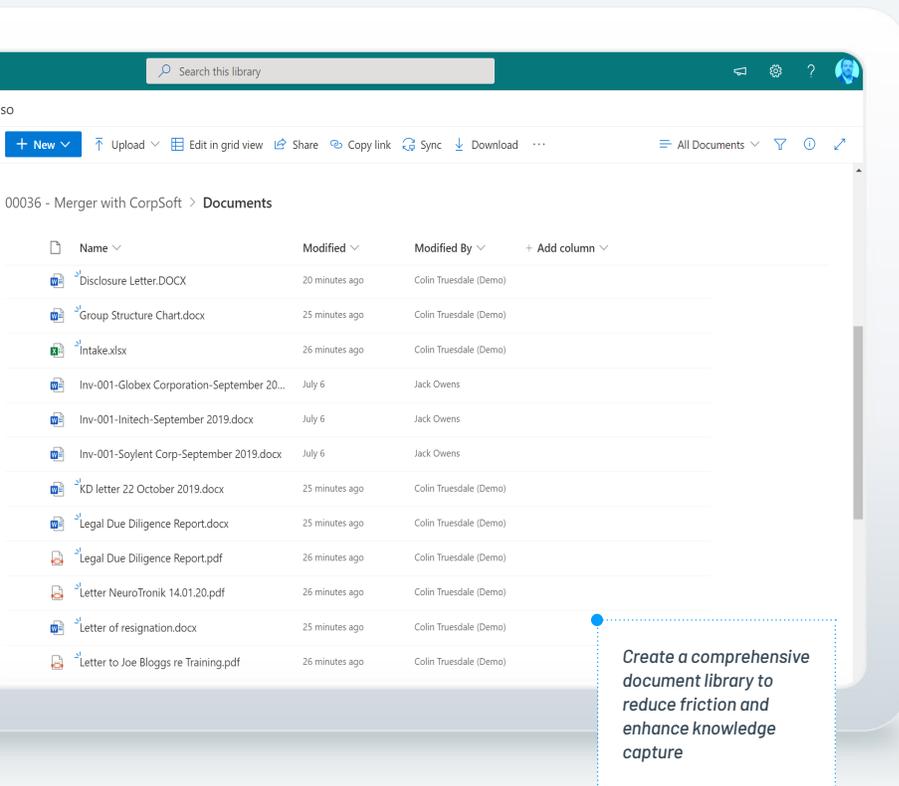


Modern Document Management for Firmwide Knowledge Capture and Sharing

Knowledge is only valuable when it can be consistently captured and easily accessed by everyone on your team. Intapp Documents, part of the OnePlace Collaboration & Content suite, turns Microsoft SharePoint into a purpose-built document management system that serves the unique needs of professional service firms.

The software connects content across all of your data sources to provide full lifecycle visibility and enhanced collaboration. Using Microsoft Outlook, Teams, and SharePoint, you can create shared content and collaborate efficiently. You can even build customized user experiences with built-in file synchronization and interoperability.



Manage Your Client Engagement More Effectively and Efficiently

- Full lifecycle visibility reduces time spent searching for multiple versions and promotes process transparency.
- Automatic synchronization means important knowledge doesn't get lost in transit.
- Assisted filing functionality minimizes time spent managing files in multiple applications.
- A 360-degree view of client and engagement information improves client engagement visibility.
- Interoperability with Microsoft 365 and other Intapp products ensures you get the most out of your technology investment.

"Centralizing matter management in Microsoft 365 via OnePlace Collaboration & Content has been crucial in enabling consistent, transparent service worldwide."

- ED COOKE, CHIEF EXECUTIVE OFFICER, CONEXUS LAW

What Puts Intapp Documents Ahead

Engagement-Centric Document Libraries

Automatically create a Microsoft SharePoint site and document library when registering a new client or engaging in upstream systems such as Intapp Intake, practice management systems, or financial management systems.

Access to DMS Content from Outlook

Extend Microsoft Outlook functionality beyond email by providing access to content systems using the same familiar interface. Access Microsoft SharePoint libraries and other repository content directly within Microsoft Outlook.

Automated Email Filing

Minimize time spent traversing complex storage hierarchies and large folder structures by filing emails to the appropriate Microsoft SharePoint engagement folder via assisted filing functionality that suggests filing locations based on document content.

Offline Access to All Content

Help remote teams and on-the-go fee earners collaborate without frustrating delays. Seamlessly view, add, and edit content within Microsoft SharePoint, Microsoft Outlook, content stores, and other file sharing services even when you're not connected to a network.

Insights and Intelligence

Give professionals access to the depth and breadth of your firm's collective intelligence – including content from other firm applications including financial management, document management, and practice management systems – by creating a single pane of glass into each engagement within Microsoft Outlook.

Professional	Start Date	End Date	Gender
Client Service Director (CSO) (2)			
Lynne Robbins	09/18/18	09/18/18	Female
Adelle Vance	09/18/18	03/16/20	Female
Exec. Committee Lead (1)			
Nector Wilkins	09/18/18	01/16/20	Male
Team Coordinator (1)			
Alex Wilber	10/08/18	03/16/20	Male
Wider Team (5)			
Andrew Jones	10/08/18	03/16/20	Male

Revenue: \$120,850
Fees Not Billed: \$32,500.00
Cost %: 66

A 360° intelligence view for holistic insights

Seamless Knowledge Sharing and Collaboration



Simplify document management and minimize change-management friction by bringing an engagement-centric experience to Microsoft SharePoint and Outlook while leveraging familiar Office 365 capabilities.



Improve client engagement visibility and maximize insights with a complete view of client and engagement information within Microsoft Outlook.



Ensure knowledge capture and reduce wasted time by synchronizing content and folder structures across Microsoft SharePoint and Outlook as well as document management systems and other file repositories.



Maximize your investment and leverage the full potential of your firm's Microsoft 365 application and other Intapp products.

Get Started with Intapp Documents: www.intapp.com/collaboration/documents/



©2021 Integration Appliance, Inc. All rights reserved. Intapp and OnePlace are registered trademarks of Integration Appliance, Inc., or its subsidiaries. Various trademarks held by their respective owners.

CONTACT @intapp | sales@intapp.com | intapp.com