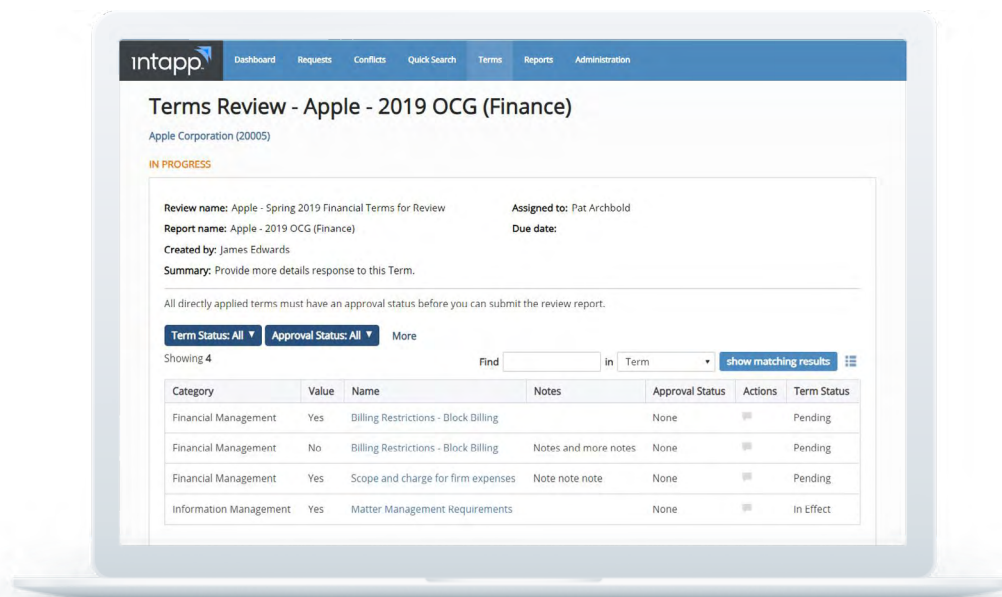


Intapp Terms

Intapp Terms provides visibility into increasingly complex and demanding client terms of business, helping you effectively promote enforcement and deliver on your commitments.

Intapp Terms helps you capture, expose, and enforce client terms of business. It leverages AI to automatically categorize terms, then centrally stores client guidelines and proactively delivers them to relevant stakeholders in response to behavior (such as when users begin work on a new engagement). Intapp Terms integrates directly with Intapp Time and other time-entry systems to provide real-time enforcement of billing terms.

It's the only software on the market that offers a firmwide view of client obligations, helping you analyze trends, identify compliance risks, and proactively negotiate when terms fall outside typical client demands. The software also helps you manage your agreements throughout the client lifecycle, as outside counsel guidelines are updated or when evolving firm policies necessitate the review of active client commitments.



Benefits



Accelerate terms review

Intapp Terms speeds the review of outside counsel guidelines (OCGs) and other client terms. It leverages AI and a library of industry-term templates to process and categorize documents in seconds. As clients issue updated OCGs, Intapp Terms automatically identifies the changes and alerts the appropriate stakeholders, eliminating the need to manually search for revisions.



Understand your commitments

Intapp Terms categorizes and centralizes client terms into a searchable database that provides dynamic reporting to enhance visibility. You can view the terms for an individual client or analyze trends across all your clients to understand the frequency of certain terms, identify variations across practice areas or industries, and recognize evolving client demands.



Enhance terms compliance

Intapp Terms automates notifications to affected stakeholders, disseminating client obligations in response to user behavior, so that everyone is aware of their commitments. And it proactively enforces key terms within Intapp Intake, Intapp Conflicts, Intapp Time, and other applications. For example, billing terms are enforced at the point of time entry (Intapp Time) and competitor agreements are surfaced in conflicts searches (Intapp Conflicts).

Features

- **Version management** to ensure you're always enforcing the most recent terms, while still maintaining a history of changes from prior versions
- **Terms templates** to support the automated processing of documents, and enable the modification or creation of firm-specific terms you wish to track
- **Advanced search** to quickly find certain client commitments, and link directly to the terms document
- **Automated notifications** to keep firm stakeholders abreast of the commitments they are subject to, and automatically alert them when terms change
- **Terms enforcement** to enhance compliance by proactively alerting stakeholders of key terms that they may have violated, in time for corrective action
- **AI-assisted categorization** to process client terms documents and automatically identify and classify the relevant terms