



Kreston Reeves selects OnePlace Collaboration & Content for engagement-centric document management

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New solution will simplify collaboration on Microsoft 365 and enhance firmwide knowledge management

PALO ALTO, Calif., Oct. 25, 2022 (GLOBE NEWSWIRE) -- [Intapp](#) (NASDAQ: INTA), a leading provider of cloud-based software for the global professional and financial services industries, today announced that London-, Kent-, and Sussex-based accounting, business, and wealth advisers Kreston Reeves has selected [OnePlace Collaboration & Content](#) to provide a collaborative, engagement-centric document management solution and help the firm maximize its Microsoft 365 platform investment.

Kreston Reeves is an award-winning firm providing accountancy, business, and wealth advice to businesses, not-for-profit organizations, individuals, and families. It will use Intapp products in tandem with Microsoft Teams, SharePoint, Outlook, and Office to better connect the people, processes, and data involved in each engagement.

Intapp collaboration and content products simplify collaboration, enhance compliance, automate governance, and help professional services firms deliver more productive, profitable engagements. As a part of this suite, Kreston Reeves will use the following components:

- [Intapp Workspaces](#), to extend Microsoft Teams with engagement-centric hubs that boost collaboration, 360-degree insights, and automatic lifecycle management
- [Intapp Documents](#), to deploy engagement-centric document management capabilities, automatically filing emails and attachments to Microsoft SharePoint

"As we adopted Microsoft 365 to play a central role in enabling a secure, collaborative, and modern work environment, it became clear that we needed to extend the capabilities of the solution for our unique needs as an accounting firm," said Chris Madden, Chief Technology Officer and Operations Director at Kreston Reeves. "OnePlace Collaboration & Content will supercharge our Microsoft investment, enabling intuitive, centralized, engagement-specific workspaces with intelligent file management."

"We are thrilled that one of the leaders in the midmarket accounting space is adopting OnePlace Collaboration & Content to enhance collaboration, document management, and knowledge management across the firm," said Alan McMillen, General Manager, Collaboration and Content Solutions at Intapp. "Intapp's alignment with Microsoft applications will boost productivity and focus for Kreston Reeves professionals by eliminating the need to switch between platforms when managing documents and communications."

Kreston Reeves will work with [Transform Data](#), an Intapp partner that resells and implements enterprise content, collaboration, and automation technology, to migrate existing data stores to Microsoft SharePoint. Transform Data's specialists will strengthen the firm's investment in Microsoft 365 by ensuring the optimal flow of data firmwide to facilitate effective document, email, and case management functionality.

About Intapp

Intapp makes the connected firm possible. We help professional and financial services firms better connect their people, processes, and data through AI-powered software solutions. Trusted by more than 2,100 of the world's premier private capital, investment banking, legal, accounting, and consulting firms, Intapp offers an end-to-end solution purpose-built to help modernize these firms. Intapp facilitates greater team collaboration, digitizes complex workflows to optimize deal and engagement execution, and leverages proprietary AI to help nurture relationships and originate new business. Intapp helps firms increase profitability and investment returns, operate more efficiently, and better manage risk and compliance. For more information, visit [intapp.com](#) and connect with us on [Twitter \(@Intapp\)](#) and [LinkedIn](#).

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About Kreston Reeves

Our purpose is to guide our clients, colleagues, and communities to a brighter future. We help dynamic businesses, charity and not-for-profit organizations, private individuals, and families with accountancy, business, and wealth advice. Offices in London, Kent, and Sussex. Website: [www.krestonreeves.com](#)

About Transform Data International:

Transform Data's solutions and services strengthen the adoption of Microsoft 365 and SharePoint. As a leading partner of Intapp's Content & Collaboration suites, we have been migrating clients from legacy platforms to SharePoint for 8 years. We help organizations optimize their employees' total productivity by combining documents, tasks, workflows, external data, and reports into one context-based user interface. Offices London & Maastricht. Website: [www.transformdata.eu](#)

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