commercial real estate and construction and contracting industries.

Mary Girsch-Bock • Dec. 18, 2017

iChannel by Conarc

www.conarc.com

From the Dec. 2017 Review of Document Management & Storage Systems.

iChannel from Conarc is best suited to larger accounting firms that desire a more comprehensive document management system. iChannel is also a good fit for commercial real estate and construction and contracting industries.

iChannel is a robust document management application that can be deployed as on on-premise solution or hosted in the cloud. iChannel also offers a free mobile app that allows users to access documents from anywhere. Accounting firms should be aware that iChannel would require skilled I.T. staff to help facilitate product setup and management.

Along with comprehensive document management, iChannel also offers CRM, Workflow, Client Portals, and Email Management functionality.

iChannel handles a variety of file formats, including QuickBooks files. All files are

functionality, allowing users to drag documents directly into iChannel when necessary. Users can edit stored documents in iChannel without checking the document out, though the product does offer document check-in and check-out functionality. iChannel retains a detailed history for each document stored, so management can view any document activity, when it was checked in or checked out and any modifications made to the document. Users can assign a retention period for each document, with the ability to archive documents for easy future access.

iChannel offers multi-level security options, with both user and group security available to ensure that only authorized individuals can access and edit documents.

iChannel's Portal is an optional application that offers bi-directional sharing of files between businesses and their clients. The portal interface has been recently redesigned to make it more efficient for both users and their clients, including the ability to see what requested documents have been received and which ones are still outstanding. Clients and other authorized users will have access to the portal using a unique user name and password. Once logged in, clients can access files by simply clicking on the Documents option, and then accessing the necessary files that populate the main screen. Both firms and clients can upload multiple files to the portal by simply choosing the necessary files and adding them to the list. The portal can be completely customized to reflect the needs of the firm.

The optional Email Manager allows users to easily share documents via email safely and securely, with the ability to create and send emails from within iChannel. Users also have the option to send documents as an attachment, as a zip file with password protection, or by using a secure link. Because of the seamless integration between iChannel and Microsoft Outlook, all emails sent and received can be easily stored in a client's record.

iChannel offers excellent integration with it all related applications which include

completed correctly and that the product is running smoothly. Authorized system users can access product support from the iChannel website, which also offers a variety of case studies and videos. An annual product maintenance fee is also charged all new users, with the fee typically around 30% of the cost of the software.

iChannel by Conarc is part of the comprehensive suite of products which includes Document Management, Email Management, Workflow Management, CRM, and a Client Portal. Pricing starts at $26.00 per user per month for Document Management, CRM, Workflow, and the Client Portal, with final cost based on number of system users, and add-ons that may be purchased. A one-time fee is typically assessed for a PDF compressor and third-party scanning engine.

2017 Rating – 5 Stars

Firm Management • Technology