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iChannel

Conarc

www.conarc.com

From the **2018 reviews of Document Management and Documents Storage Systems** for accounting firms.

iChannel from Conarc is well suited for a variety of businesses including accounting and legal firms, construction companies, contractors, and commercial real estate. iChannel is a robust document management application that can be installed onsite on a desktop or server, or hosted in the cloud. Those opting for the onsite solution would likely require skilled I.T. personnel to handle product installation and setup. A cloud version of iChannel, iChannel in the Cloud, is designed for smaller businesses and includes a portal, CRM, integration with other applications, support, storage, email management capabilities.

iChannel supports and archives a variety of file formats, with all files stored in their native format. Users can easily view a list of all stored documents from the iChannel dashboard, which is fully customizable. Drilling down to the document screen offers multiple options and information, including access to a list of documents which includes information such as document format, document name, created by, last users, modification date, and creation date. The product also offers open

architecture, making it easy to integrate iChannel with just about any software

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option to edit a stored document without checking the document in or out. The included audit trail tracks all document activity, so managers or admins can see who has checked a document in or out, as well as view any modifications made to the document.

iChannel offers good document security, with admins able to assign both user and group level permissions, ensuring that only authorized personnel can access documents.

iChannel's Portal offers bi-directional file sharing capability with firm clients and colleagues, making it easy for both accounting firms and their clients to upload and download documents securely. The dashboard view in iChannel Portal provides users with the status of all requested documents, enabling users to view when requested files have been uploaded to the portal, as well as the ability to view which documents have been accepted, rejected or are still outstanding. Users can provide select clients (or all clients) with a login and password in order to access the portal, which can be easily customized to suit user needs. Just as the iChannel environment can be customized with a firm's brand by using their logo as the home button, the Portal can be further optimized for clients with similar branding options.

Also available in iChannel is Email Management, that provides users with a terrific way to manage emails by automatically filtering, sorting, and searching emails contained in an email thread. The Email manager also integrates with Microsoft Office, allowing users to easily store all relevant client emails in the client record. The product also contains an embedded secure file transfer tool for secure file sharing. The CRM module allows firms to manage client details and includes the ability to add clients and contacts to global groups, as well as provide a list of contacts for each client in the system.

iChannel is a completely integrated system, with the document manager working

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telephone and email support, as well as, self-serve training videos and tutorials. Users can also submit a ticket requesting support. The iChannel website also offers access to both case studies and a variety of videos.

iChannel by Conarc is well suited for accounting firms as well as other enterprises that are looking for a robust document management system. Previously geared towards larger businesses, iChannel in the Cloud is affordably priced, and well-suited for smaller businesses as well. iChannel offers complete document management capability as well as CRM, Workflow Management, and a Client Portal. iChannel in the Cloud currently costs about \$50 per user, per month, based on the number of seats needed, with product implementation and training options available. Users can also request a quote for iChannel's flagship onsite application directly from Conarc.

2018 Rating – 5 Stars

Firm Management

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