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Mary Girsch-Bock • Sep. 16, 2019



iChannel

Conarc

www.conarc.com

From the 2019 reviews of [Document Management and Storage](#) systems for accounting firms.

iChannel from Conarc is best suited for larger businesses that have complex document storage and management needs, including accounting and legal firms, contracting companies, and commercial real estate companies. iChannel offers various deployment options and can be installed on-premise or hosted in the cloud. For smaller firms, with less extensive needs, iChannel in the Cloud is available, combining document storage and management with CRM and client portal

capabilities, while the onsite application also includes email management

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creator, and the original date the document was created. Users can also search for documents from the dashboard using a variety of search criteria including the ability to exclude emails in the search, the ability to add a document type or year, or search for a document by current status.

iChannel offers document standardization capability, ensuring compliance across the board. Users can also create a retention policy that applies to all documents, or create an individual retention policy based on client and document types. A document archive is available to store documents indefinitely or until they can be purged, and users can easily create multiple versions of a single document, with the option to create document versions while also retaining the previously edited document. iChannel also includes complete drag and drop capability, making it easy to store documents such as client emails or related client documents. Document check-in and check-out capability is also offered, though authorized users can also edit a document without checking it out. An audit trail is also available in iChannel, providing details about document access and any subsequent changes made. The product also offers good security, with firms able to assign user and group level security to prevent unauthorized access to stored documents.

For firms that need to share documents with clients securely, iChannel's Portal offers bi-direction file sharing capability with firm clients and colleagues. The portal dashboard makes it easy to check the status of any request made to a client, with users notified when a document has been uploaded to the portal. Firms simply provide portal access to their clients by providing a login and password, which can be customized as needed, with staff choosing which clients will have access to the portal, where they can access document requests, submit the requested documents, and download any shared files.

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