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From the **May 2013 review** of Document Management systems.

Best Firm Fit

- Firms of 25 or more who need an integrated document management, client portal, project management, and CRM capabilities

Strengths

- Web-based application with options for on-premises, hosted, and managed server deployment
- Secure e-mail function allows users to compress, password protect, and e-mail files to a recipient from within the Document Manager.
- Integrated tool designed to provide document management, client portal, project management, and customer relationship management (CRM) functions to mid-sized and larger firms
- Project management and workflow is impressive, and allows users to route tasks to individuals or groups
- Prepackaged integrations with common CPA firm applications, including CCH ProSystem *fx* suite apps (Tax, Engagement, Practice, and Scan) as well as Caseware Working Papers, Intuit Lacerte Tax, Thomson Reuters UltraTax CS, and XCM Workflow.

Potential Limitations

- The power and flexibility of this product also increases the complexity of its initial

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or more, and is designed to work in a complex, multi-site technology environment.

iChannel has a very strong set of product integrations, including Microsoft Outlook and Microsoft Exchange, tax products (ProSystem *fx*, UltraTax, Lacerte), engagement management software (CaseWare Working Papers, ProSystem *fx* Engagement), and many others. The software also integrates with Windows Server Active directory, and also allows firms to sync contact information with each user's instance of Microsoft Outlook using a utility. Client names and addresses can be downloaded from the Firm's practice management application and used to configure an initial file structure.

iChannel stores documents in a Windows folder structure, and supports data storage across multiple locations. Users can be locked out of the file locations through Windows, and be required to retrieve all data through iChannel. The application supports check-in and check-out, as well as version control.

The product supports multi-step user-definable work processes, and users can monitor projects and assignments through a projects in-box. The projects are linked to the built-in CRM capabilities as well as the documents, and a detailed history is maintained for each activity. Although iChannel was initially developed for CPA firms, the Company has increased its vertical industry presence to include other industries such as commercial real estate and property management.

The iChannel portal solution is full featured, and allows users to host their own portals with an on-premises server if desired. Users can request files from clients and be notified upon receipt, send files as encrypted attachments, and password protect PDF files from menu options within the application.

Summary and Pricing

All of the iChannel applications are bundled for a single price of \$540 per user for up

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Document Workflow	5.0
Document Control	5.0
Special Features	4.75
Overall Rating	5.0

Firm Management • Technology

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