CPA Practice **Advisor**

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

paperless environment - the vehicle to identify, categorize, and store important company knowledge.

Jul. 17, 2014



iChannel Features

iChannel Intranet Document/Content Manager

A web-based collaborative content manager that is seamlessly linked to multiple inhouse applications and publishes client related information to private extranet client sites. With indexing, versioning, online discussion, and extensive search and sort capacity, this powerful integrated solution is the central system to a high efficiency paperless environment – the vehicle to identify, categorize, and store important company knowledge.

- Document Management/Collaboration
- Customization to integrate with legacy systems
- Full Boolean text search across the entire repository
- Content discussion capacity (threaded to document)
- Versioning of documents
- Automatic email notification on activity with documents
- Check-in, check-out of document with history of activity

• Centralized and/or decentralized document storage

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

maintaining consistent client records throughout the organization. The CRM is integrated with Microsoft Outlook[™] so that iChannel's centralized contact database can be bi-directionally synchronized with each individual's personal Outlook.

- Clients
- Contacts
- Calendaring
- Activities Meetings/Tasks/Email/Reminders/Faxes/Notes
- User Defined Fields

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved