## **CPA** Practice **Advisor**

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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

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maintaining consistent client records throughout the organization. The CRM is integrated with Microsoft Outlook<sup>™</sup> 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

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