DOCUMENT MANAGEMENT

2014 Review of iChannel by Conarc

Conarc's iChannel is a comprehensive document management system which is designed to cut across multiple areas of an organization. The application provides functions for customer relationship management (CRM), client portals, document management, and workflow management. The application is targeted at firms of 25 or more, and is designed to work in a complex, multi-site technology environment.

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Overview

Conarc's iChannel is a comprehensive document management system which is designed to cut across multiple areas of an organization. The application provides functions for customer relationship management (CRM), client portals, document management, and workflow management. The application is targeted at firms of 25 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.

Mobile apps for iOS and Android devices are also provided at no additional charge. This CRM functionality is one of the key features of the product which sets it apart from other document management solutions in this review.

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 has prepackaged integrations with many software tools used by mid-sized and large CPA firms, including products from CCH, Thomson Reuters, and Intuit.

The product supports multi-step user-definable work processes, and users can monitor projects and assignments through a project 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.

Best Firm Fit

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

Strengths

- A comprehensive document management suite which now includes support for drag and drop import and e-Signatures.
- iChannel has an integrated portal module which supports common client interactions, including requesting files, receiving responses to requests, and publishing final engagement deliverables.
- 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

- Web-based application with options for on-premises, hosted, and managed server deployment
- 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 configuration. The flexibility requires firms to have a well thought out organization and indexing scheme for their documents before they can begin using the tool. As a result, this product may not be the best solution for firms of 25 or fewer and/or firms without an internal IT function.

Summary and Pricing

All of the iChannel applications are bundled for a single price of $540 per user for up to 30 users, volume discounts are provided after that. The annual maintenance fee is 30%. There is also a onetime fee of $12k for a third party scanning engine and PDF compressor.

2014 Overall Rating: 5 Stars

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