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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.

iChannel is a completely integrated system, with the document management

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Request and share documents with clients. The product uses an open architecture, making it easy to integration iChannel with just about any software application including all Microsoft Office applications. There is also a mobile app that works with both iOS and Android devices.

Conarc assists all new customers with complete product implementation and training, which takes approximately two weeks. Access to the iChannel support page is password protected, providing access to telephone and email support. A ticket requesting support can also be submitting for less urgent support issues. iChannel case studies as well as a variety of product videos and conference highlights can also be accessed from the vendor's website.

iChannel is best suited for larger firms with more complex document management needs. iChannel currently offers complete document storage and management capability, along with CRM, Workflow Management, Client Portals, and Email Management, with all modules priced separately. For smaller firms, iChannel in the Cloud includes CRM and a secure portal and starts at around \$50.00 per user, per month, with the final cost dependent on the number of system users. Those interested can also request a custom quote directly from Conarc.

2019 Rating – 5 Stars

Firm Management

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