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iChannel

Conarc

www.conarc.com

From the 2020 reviews of Document Storage and Document Management systems.

iChannel from Conarc is designed for businesses with complex document management requirements. Suitable for a variety of businesses including accounting and legal firms, construction and contractor industries as well as real estate companies, iChannel offers both on-premise and cloud hosted deployment options. Along with document management, iChannel also offers a variety of separate modules including CRM, Email Management, Workflow Management, and Client Portals that are designed to integrate.

For smaller firms, Conarc offers iChannel in the Cloud, which combines document

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name, category, date of any modification, and the document creator. iChannel offers excellent document search capability, with users able to search for documents using information such as document type, document name, or document year. Users can also choose to search for a document by current status, if desired.

iChannel offers document standardization capability, ensuring accuracy and consistency for all files. Firms can create a retention policy based on internal requirements that can apply to all documents across the board, or create a customized retention policy for each client based on their own particular industry and needs. The document archive can store documents indefinitely, or until they are purged from the system. iChannel also offers document versioning, again based on user needs, with an option to create a new version as a separate document or save a new version over a previous version. Users can add documents and files to iChannel from the desktop using drag and drop capability, making it easy to save external documents such as notes, emails, and other related documents. iChannel also uses a document check-in and check-out process, so managers will always know where a particular document is at any time. An audit trail provides details on any document changes made and good security allows managers to assign user and group level security to any system user.

The iChannel Client Portal allows users to upload and download files from the convenient dashboard, which features easy access to the Shared by and Submitted to folders, while the bi-directional client portal offers secure file sharing with clients and colleagues alike. Navigating the portal is easy using the portal dashboard, where users can check the status of any requested documents. Users will also be notified when a document is uploaded or downloaded from the portal and can choose which clients have access to the portal. iChannel also offers secure file sharing via email, with clients provided with a link to a file in the email.

iChannel's document management application is designed to integrate with other

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iChannel includes a built-in open architecture, making it easy for the application to easily integrate with an unlimited number of third-party software applications as well as all Microsoft Office applications. iChannel also includes a mobile app that works with both iOS and Android smartphones and tablet devices.

Conarc is an active partner in the product implementation process, assisting all new customers with both product implementation and training, which typically lasts around two weeks. All help, support, and the product knowledge base are password protected, though videos and whitepapers are available on the Conarc website. Both telephone and email support are available and users can also submit a ticket requesting support for non-urgent issues.

iChannel is better suited for larger firms that have more complex document management needs. The application currently offers document management and storage capability along with Workflow Management, a Client Portal, CRM, and Email management, with all modules priced separately but designed to work together. For those looking for a less complex application, iChannel in the Cloud is available and includes document management, CRM, and a client portal. Those interested in either application can contact Conarc directly to obtain a custom quote.

2020 Rating – 5 Stars

Strengths:

- Can handle complicated document management needs
- Handles the majority of the implementation process
- Stores documents indefinitely

Potential Limitations:

- Requires significant setup and training

- Will need to purchase multiple add-on modules to get the complete benefit of the

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