# *i***CHANNEL**



# End User Guide Owner's Manual

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## iChannel – Course Overview

#### Welcome to iChannel End User course training

iChannel is a web-based, Collaborative Content Management System with extensive document search and sort capability, document versioning, online discussions, integrated email functionality that provides your organization's information to be accessible by anyone, at any time, from anywhere. iChannel facilitates is powerful end user solution in a centralized system that facilitates communication and collaboration within and across your organization. The result is a paperless office environment which promotes efficient, simple, high-speed access to your data with a click of a mouse.

The iChannel Portal feature allows all the features and benefits of iChannel to extend to your clients and other organizations that you choose to share information and collaborate with.



### **Course Overview**

Identifying the core building blocks and concepts of iChannel is vital in understanding how the centralized system is used to identify, categorize and store your organization's important documents. With iChannel, users in your organization will:

- Standardize procedures
- Increase efficiency
- Enhance client services

This iChannel course is organized into modules and as an exercise-based approach with a combination of group discussions and hands-on application simulations to establish a foundation for iChannel.

Throughout this course, you will practice working with what you learn with the use of instructor, group and self-paced, and knowledge checks exercises designed to apply to your own business model and business policies and procedures.

The following illustration provides an overview of the workflow process for iChannel presented in this course.

Your organization will determine your security profile. Therefore, certain iChannel modules, features (ability to view | add | edit | delete) might not be within your access.

If you feel you should have access to any feature, please contact your System IT Administrator.



## Module 1: Getting Started with iChannel

Administrators and End Users have easy access to iChannel and iChannelDesk. Depending on your needs and permission level, your system administrator can grant or limit as many of the iChannel features as necessary. A login will be required for anyone within the organization who will be using iChannel tools and features and/or requires access to any module within iChannel.

#### Module Overview

The follow exercise will introduce the building blocks and tools of Getting Started with iChannel.



# \Sigma Login to iChannel

ер	Action
1	<ul> <li>Enter your defined iChannel URL address in a browser window.</li> <li>Go to https:// to access iChannel</li> </ul>
	Browsers and Resolutions recommendations
	<ul> <li>Desktop – supported Browsers for Direct Mode editing:         <ul> <li>Microsoft Internet Explorer v11.379 and above</li> <li>IE Edge is not supported.</li> <li>Google Chrome v72.0 and above (only for Windows)</li> </ul> </li> <li>Resolutions – recommended screen resolutions:         <ul> <li>1280 x 1024 (5:4 ratio)</li> <li>1920 x 1080 (16:9 ratio)</li> </ul> </li> </ul>

# Module 1: Getting Started with iChannel



## Module 2: iChannel Dashboard



Once logged into iChannel the **iChannel Dashboard** is the first window you will see. The iChannel Dashboard displays a summary of your personal settings, or Widgets. There are three (3) main areas on the iChannel Dashboard.

- iChannel Banner
- IChannel Quick Search and Quick Links
- My Dashboard

#### **Module Overview**

The follow exercise will introduce the building blocks and tools of the iChannel Dashboard.





#### ] iChannel Banner

- *iChannel Home icon* "your" company logo will always display at the top left. Clicking your company logo will always take you back to the iChannel Dashboard from any window in iChannel.
- *iChannel Modules* the navigation module(s) provide quick access to different areas of iChannel including:
  - Files allows users to search for documents across Sites

- Contacts allows users to search for Contacts and/or Sites based on more specific information.
- Workflows allows users to see all Workflow Projects and have more searching capability and reporting.
- System (Admin Module only) allows Administrator system admin rights to iChannel.
  - Additional details on each iChannel Module will be detailed further in this guide.

#### 📐 Quick Search

Quick Search - allows users to quickly search for Sites or Contacts. To perform a quick search, you will need to enter at least 3-characters in the search field. If you want to include

Include Inactive	Search	*

inactive sites | contacts in your search, put a check in the *Include Inactive* checkbox.

- Quick Search Results
  - *Select* the **Folder icon** to access the Document Management Area for documents associated with the Site.
  - Select the Sites Name to access the CRM Site details page.
  - **Type/ID/Industry** and **Client ID** is provided that links from external applications. I.e. STAR, Practice Managements, Salesforce, to name a few.
  - Contacts list the Main Contacts, Linked Contacts, Internally Assigned Contacts for that Site.

Files	Name	Type/FEIN/Industry	Custom Fields	Contact List	Hide Projects
	Shelby's Bridge Thrift Shop 103 Main Street Sudan, Tx 79371 555-555-5478 www.shelbysbridge.org	Client SB-0001 Retail	Partner: Lacy Magby Manager: Bobby Underwood Biller: Jennifer Farrell Tax ID: 01-	Clay Cannon John Carpenter Tim Ellis Frans Grotius Donna Janson Shelby Smith Shann Frans Grotius Bobby Underwood Summer Underwood	Add Contac
			123456	<ul> <li>1040 Tax Return 2019 - Bobby Underwood - 07/17/2 2018-Tax Return-Non Profit - Lacy Magby - 06/25/20</li> </ul>	

 Domain (Root) Sites – If you have permission to view additional Domain sites, next to Quick Search is a double-down-arrow, click the arrows. The Quick search changes to a drop-down (Access to other domain sites depends on your security. Not all users have access to other sites and will not see them listed if access is restricted).



- iChannel Support click to access iChannel Support.
- My Activities click <sup>111</sup> to access activities associated with your User ID across all Sites.
- User Profile click b to access and edit information in your profile. (i.e. updating your email signature for sending emails from iChannel).
- Logout click the Logout button to securely log out of iChannel.

#### 📐 My Dashboard

- **Edit** click **C** Edit to open the iChannel My Dashboard editor to customize your dashboard.
- **Manage** click <sup>A Manage</sup> to open the iChannel Manager Dashboard options.
  - *iChannel Widgets* customizable area where each user can define unique "widgets" to display vital information about their clients, documents, workflows, tasks, to name a few.



Items that appear on your iChannel Dashboard are controlled by your System IT Administrator and your iChannel Security Group settings.

Please contact your System IT Administrator if you do not have access to all features on the iChannel Dashboard.

# 🔪 iChannel Dashboard – Widgets

The iChannel Dashboard is highly customizable area where each user can define unique Widgets to display vital information that is important to that user to manager their clients, documents, workflows, and tasks, to name a few.

Files Contacts Projects Pipeline Calendar Routing	New Routing System	ICHANNEL	Include Inactive Search	0008 🔜
My Dashboard ~			Gf Edit	Be Manage O O
My Entitles	o ■ My Tasks	0	연] My Documents	٥
Entity Ranking	-		Type Title Year - Entity	Modified Ranking
SRU Entity (SRU.001) • *****	My Projects	٥	No data available in table	
Conarc, Inc-Main (Root) (CONARC-MAIN)	Assigned: Primary   Underwood, Bobby		Showing 0 to 0 of Show 25 • 0 entries	5. 2
AG360 Insurance (AgPro-M)	Nothing selected			
Admirals Bank	Order Project Status  No data available in table	Due	My Assigned Documents	٥
Total: 4 Show 25 v			Assigned: Underwood, Bobby -	7
	0 entries	( )	Type * Title Year Entity No data available in table	Assigned By Due
My Recent Entities	이 아이	۵	Showing 0 to 0 of Show 25 V	< >
Entity Accessed Ranki Glacy Magby Test Entity (TESTING ID-123123) a month ago	Assigned: Underwood, Bobby -		0 entries	
	Nothing selected •		Ph My Checked-Out Documents	0
	tion briter states	Due *	Assigned: Underwood, Bobby -	1
AG360 Insurance (AgPro-M) an hour ago o	Charles 6 to 1		Type A Title Year	Entity Due
Conarc, Inc-Main (Port) (CONARC-MAIN) in 9 minutes	Dashboard Widgets	- +	ste une orangere et conc	
SRU Entity (SRU.001) 35 minutes ago 💩 🌟	bl		Showing 0 to 0 of Show 25 * 0 entries	( )
Total: 5 Show 25 V	My Calehoar eventua		u entries	
	Assigned: Underwood, Bobby		와 My Recent Documents	٥
	Nothing selected - 🔽 🥝 🖸	-	Type Title Year Entity	Accessed Ranking
a my contacto	Task Type Start      No data available in table	End 4	No data available in table	
Action Contact/Entity Phone Ranking Contact/Entity	Showing 0 to 0 of Show 25     O entries	¢ >	Showing 0 to 0 of Show 25 • 0 entries	( )
Total: 1 Show 25 🔻				
Activity Monitor for Entities	0			
Underwood, Bobby - I @ O Entity	-			
Admirals Bank				
AG360 Insurance (AgPro-M)				

Module	Widget	Description
	Activity Monitor for Contacts Activity Monitor for Entities	Displays the <b>Activities</b> for the <b>Contacts</b> and <b>Entities</b> you have selected for My Entities & My Contacts. Settings let you choose the contact list and number   date range of the activities.
	My Calendar Activities	Display a list of the <b>Calendar Activities</b> you are associated with and the settings let you choose the person, status, and date range to be displayed.
CRM	My Contacts My Entities	<b>My Contacts</b> & <b>My Entities</b> display a user's "bookmarked" contacts and File Area. Each user will select a <b>Star Rating</b> for Clients   Sites and Contacts to have them displayed on their dashboard. Once displayed, users have <i>one-click access</i> to the Document Management Area, Discussion, Activities, & CRM record or that Client   Site or Contact.
	Recent Entities	The recent client's area <b>provides links to the client area</b> you have last accessed. The latest one will be placed on top and move down the list as you visit other file areas. You may click on the folder to go to the document management area for that client.
	My Assigned Documents My Checked-Out Documents My Documents	Display the documents you have checked out and their <b>due date</b> . Also displays any documents that have been assigned to you and the corresponding due date.
Files	Recent Documents	<b>My Recent Documents</b> provide links to documents you have recently accessed. You can click the folder icon to go to that client document management area or click the document name to open the document. Use the <b>Star Ranking</b> to bookmark the document on

	My Deliverables	your dashboard. The <b>Type</b> column displays the file format for the document. This widget is for users of the Workflow Module that are using the
		Custom Deliverable grid. Displays the Deliverables and due dates for the Projects you are assigned to. Each Deliverable will be associated to a status to show their progress. <b>RED</b> – overdue. <b>YELLOW</b> – on- hold. <b>GREEN</b> – in-progress.
Projects	My Projects	My Projects (Workflows) display all the workflows where the user is listed as the "primary" contact person. Tasks are listed by the order number. Viewable information includes the project name, due date and any assigned Workflows. Sites listed for the workflow are also displayed in the widget. Each Workflow will be associated to a status to show their progress. <b>RED</b> – overdue. YELLOW – on-hold. <b>GREEN</b> – in-progress.
	My Tasks	Display a user's designated tasks that have not been completed. Clicking on the checkmark icon (far right) will mark the task as "Complete". Use the Assigned drop-down list to see other users assigned Tasks, Sites listed within the widget.

### Dashboard Layout | Icons

lcons	Description
	Click the folder icon will direct the user to the Document Management Ara for a
	Site.
0	Click the information icon will direct the user to the Last 10 Activities, Last 10
	Discussions, and Quick Add Discussion for that Site.
🚳 My Dashboard 🗸	Click the My Dashboard icon to display additional dashboards that you have
	permission rights to view.
© 0	Click the up-arrow to "Hide Widgets", click the down-arrow to "Show Widgets".
Grotius, Fra	Click the information icon with the down-arrow to quickly Create an Email for that
Create Email	site or to open the site website.
Open Website	
Ranking -	Star Ranking allow the user to "Favorite" a Site, Contact, Documents from 1-5 Stars
• ***	(5 Highest, 1 Lowest). Once you have ranked with a star, it will show under any
• ***	widget that begins with "My". To clear a star ranking, <i>click</i> on the " <b>minus</b> " icon
● ★★★★	next to the stars.

# Si Channel Dashboard – Customize Your Dashboard Layout | Create New Dashboard (Admin Permission)

If your System IT Administrator | Organization has given you access rights to the **Edit** or **Manage** features; you can add, edit, modify your widgets on your iChannel Dashboard. In addition, your System IT Administrator | Organization might create an organizational "**default**" dashboard for your use.

	🕼 Edit	🤀 Manage	۲	٥	
■ My Tasks					0
≣ My Projects					0
4 My Deliverables					٥

### **Customizing Your Dashboard**

Step	s for Customizing Your Dashboard
Step	-
1	<i>Select</i> or ensure " <b>My Dashboard</b> " is listed. If not, use the <i>drop-down arrow</i> to find the dashboard you want to customize.
	Select the Copen Editor) icon, the <b>My Dashboard Editor</b> window will display.
	Utyreterreteres     •     M My raises     •       [] My Entries     •     III My Projects     •
	With Contacts 0 Of Mix Defendedes 0
	€Casher   27 thr Edu
	My Dantourd
	Destaur fune
	Norther of Columns 2 * * Monder Extended for the Column and the Co
	Waget Select Waget ~
	0.4/1944
	Column 1 Column 2
	Rest Edition         W         My Texting         W           My Entities         Wy Paperts         W         My Entity         My Entity
	W Colorada
	M Doorent R
	To update the dashboard name, <i>enter</i> a new name in the <b>Dashboard Name</b> field.
2	•
	To update the Number of Columns that will display on the dashboard, click the drop-down
	arrow and <i>select</i> either 1, 2, or 3 columns. (It's recommended to default to two (2) columns).
	To add additional widgets to your dashboard, <i>select</i> the <b>drop-down arrow</b> next to the <b>Module</b>
	field.
	• CRM – (6): six widgets can be added to your dashboard
	<ul> <li>Recent Entities, My Contacts, My Entities, My Calendar Activities, Activity Monitor for Contacts, Activity Monitor</li> </ul>
	• Files – (4): four widgets can be added to your dashboard
	<ul> <li>Recent Documents, My Documents, My Assigned Documents, My Checked-Out Documents</li> </ul>
	<ul> <li>Workflow – (3): three widgets can be added to your dashboard.</li> </ul>
	<ul> <li>My Tasks, My Projects, My Deliverables</li> </ul>

## Module 2: iChannel Dashboard



# Module 2: iChannel Dashboard

	Image   Image </th
	The Dashboard   Manager window displays.
	Files Contacts Calendar Routing Projects Pipeline System
	Assigned Dashboards 3 Editable Dashboard () Widgels () Custom Widgels ()
	Assented Dearbicoards
2	Click Editable Dashboard 3 . Click Create . The Dashboard Assigned Editor - Admin Mode page displays.
	Dashboard / A Manager / IP Editable Dashboard      Editable Dashboard      Editable Dashboard      Demo (ROOT)      Cancel      Cancel
	Suboribers Without Dashboard. 20
	Subscribers: Is Default Dashboard: Create for New Subscribers:
	Dashbarr Name Number of Columns 1 Wodule
	Widget Eelect Widget  Select Widget
	O Add Wróget
	Column 1
	Show     O Cancel
Editable Dashboard	By default, the <b>Is Enabled "slide-bar"</b> is <i>set</i> to enabled. By default, the <b>Create for Current Subscribers "slide-bar"</b> is <i>set</i> to enabled.
	If the new dashboard is to be the "default" dashboard, move the "slide-bar" from disabled to
	enabled. By default, the <b>Create for New Subscribers "slide-bar"</b> is <i>set</i> to enabled.
	Editable Dashboard
	Subscriber Site:     Demo (ROOT)       Subscribers Without Dashboard:     21
	Is Enabled: Create for Current
	Is Default Dashboard: Create for New Subscribers:

3

4

To update the dashboard name, *enter* a new name in the **Dashboard Name** field. To update the **Number of Columns** that will display on the dashboard, *click* the **drop-down** arrow and select either 1, 2, or 3 columns. (It's recommended to default to two (2) columns). To add additional widgets to your dashboard, *select* the **drop-down arrow** next to the **Module** field. **CRM – (6):** six widgets can be added to your dashboard • Recent Entities, My Contacts, My Entities, My Calendar Activities, Activity Monitor for Contacts, Activity Monitor Files – (4): four widgets can be added to your dashboard Recent Documents, My Documents, My Assigned Documents, My Checked-Out Documents Workflows – (3): three widgets can be added to your dashboard. My Tasks, My Projects, My Deliverables Module Widget CRM - (6) Files - (4) Projects - (3) Next, select the drop-down arrow next to the Widget field. From the list, select a widget then click the Add Widget button to add that widget to your column (either Column 1, Column 2 or Column 3, depending on the number of columns you have selected). My Calendar A × × To order your Widgets, click + hold down the left side of your mouse, and drag the widget to a new order. The order of the widgets in the Column, determine how they will appear on your Dashboard. Add Widget Column My Documents ж Recent Documents × To remove a Widget from your Dashboard, *click* the "red X" icon El Save 🛛 🕲 Car next to the widget in the column. To save your updates, *click* the **SAVE** button. To cancel your updates, *click* the **Cancel** button.

## Module 3: iChannel Document Management

iChannel provides a single point of management from which users can view and access documents from anywhere at any time. iChannel provides the company with standardization, version controls and the ability to administer retention policy.

iChannel can handle an entire firm's content and specialized integration points to speed up data collection and standardize processes. Manager all your documents in their native file with flexible file sharing via email and secure access for multiple users. Take collaboration to a whole new level with indexing, versioning, online discussion and extensive search and sort features, as well as check-in and check-out of documents with history tracking.



#### **Module Overview**

The follow exercise will introduce the building blocks and tools of the iChannel Document Management.



In this module, **iChannel Document Management**, the following topics will be reviewed in detail:

# Module 3: iChannel Document Management Table of Contents

# *i***CHANNEL**

Document Management (File) Area Search – Global Search Document Management Area Search - Client | Site Document Search S File Area Overview 🔪 iChannel File Header | Filter bar **Document Search Features** Discussions | Activities Summary Quick Link Show Activities Quick Link . **Projects Quick Link** iChannel Mail Quick Link Add New Document Quick Link . Security Icon Advance Search Icon Title/Description or Content filter Type | Year | Status filters . Filter | List All options Document Drag-and-Drop feature

### Subtopic Category i Channel Filter Topic | Subtopic Category

- . Filter: Categories
- Filter: Tags

#### iChannel Document Management Area – File Listing

- iChannel Document Management Area Overview: **Column Feature**
- iChannel Document Management Area Overview: **Action Icons** 
  - IChannel Document Management Area Overview: File Listing Icons
  - Direct Editing | Stream Mode Editing | Off-line Editing
  - **Document Email Notification for iChannel**
  - Document Email Notification for iChannel Turn ON preview for Emails and PDFs
- Action Icon: Document Properties
- Action Icon: Copy Internal Link
- Action Icon: Document History
- Action Icon: Discussions
- Action Icon: Assign Tags
- S Action Icon: Version and Open
- Action Icon: Check-Out
- S Action Icon: Check-In
- Action Icon: Permissions

# iChannel Document Management Features

- **Multiple Document Feature Gear Icon** 
  - 뉩 Gear Icon: Email
  - S Gear Icon: Request Docs
  - S Gear Icon: Copy to Zip
  - S Gear Icon: Assign Status
  - Sear Icon: Assign Tags
  - S Gear Icon: Merge PDF's
  - S Gear Icon: Secure PDF's
  - Sear Icon: Copy Internal Link
  - Sear Icon: Check-Out | Undo Check-Out | Check-In
  - Sear Icon: Undo Check-Out
  - Sear Icon: Check-In
  - Sear Icon: Create Portal Request
  - S Gear Icon: Assign To
  - Sear Icon: Move | Rename | Copy
  - Sear Icon: Rollover
  - Gear Icon: Re-Categorize
  - Gear Icon: Publish and Link
  - Gear Icon: Publish Only
  - Sear Icon: Link Only
  - 🔊 Gear Icon: Unpublish / Unlink
  - Sear Icon: Copy to Folder (Append)
  - Sear Icon: Copy to Folder (Replace)
  - Gear Icon: Mark for Deletion
  - Gear Icon: Delete <u>\</u>

## Document Management (File) Search – Global Search

From the **iChannel Dashboard Banner**, select the **Files** link to open the Document Management Area Search screen. The Document Management Area Search and Document Search features let you look for clients by defining client filter options and allows you to search for documents by defining document filter options. iChannel provides default search fields and includes a separate section, where an organization can define up to 15 unique filter options.

The Document Management Area Search screen also allows the combination of client filter options with the document filter options to help you narrow the search results. The **Save Criteria** feature will allow users the opportunity to save their filter settings for future use.

```
Overview: Document Management Area (File) Search – Global Search
Action
```

From the iChannel Dashboard Banner, *select* the **Files** link. The **File Area Search | Document Search** screen will display.

Files	Contacts C	alendar Routing	Projects Pipeline	System	
File Area Search			Document Se	arch	
	Begins With B	xact Match	Include File	Area Search Criteria	<b>.</b>
Company Name:			Document Title:		
FEIN:				Search Descri	ptions
Type: Last Modified: Industry: Partner	<b>T</b>	▼ 	Document Type:	Word Excel Powerpoint Pdf Email	AC AI ASP CAB DOC DOCX DOT
Group			Document ID:		
Entity			Full Text/Conten	t:	0
Manager			Year:		
Biller			Status:		
Tax ID			Category:		•
Expanded Activ		_	Permanent D	ocuments	
	Company Sea	rch	Created <b>•</b> :		
<<			Sort By:	Date 🔻	
			All Created User ID:     Show Comp	Checked-Out	cuments of the above criteria.
		Save C	riteria Clear Saved Criteria		

# ∑ Document Management Area Search: Client | Site

- **Begins with** select this option to search for a Client | Site where the search will look for the first few letters of the client | site name you define.
- Exact Match select this option if you want to search for a Client | Site where there "must" be an exact match on any filter you define.
- Filter Options enter any information you have about the client | site.
  - Entering a name or partial name will list any client | site which contains a portion of the text you entered.
  - The more filter options you define will narrow your search results allowing you to find the client | site quickly.

- **Expanded** *select* the **Expanded checkbox** if you want to include the client address in the search results.
- Active | Inactive drop-down select Active to only include active clients in the search results. Select
  Inactive to only include inactive clients in the search results.
- Save | Clear Search Criteria *click* the Save Criteria link to save the data you have entered in any search field to use these filter options in the future. *Click* the Clear Criteria link to clear any saved search criteria.
  - This is useful when repeatedly searching for the same type of client or doing repetitive searches where only a few field values will change.

*Click* the **Company Search** button. If you choose to not enter any filter options, all clients that you have permission to view will be returned.

• From the Search Results screen you have additional options:

- *Click* on the **Search Listing** to do a new search
- *Click* on the **Site Name** to access client CRM screen
- Click on the Folder icon to go to the clients Document Management Area
- Click on the Email icon to go to the client's Email Area

Search Results								Search	Listing
Name	Company Ty	pe FEIN	Partner	Group Ent	tity Manager	Biller Tax	ID Modified		Contact
🗀 💷 Adams Systems, Inc	Client	ADAMS09	ADAMS09				01/17/2019	09:09 PM	1 1
🗀 💷 Admired Transportation, Inc	Client	ADMIR-1	ADMIR-1	3 1		JB	01/17/2019	09:08 PM	1
C II Advanced Incurance Underwritere	Client						01/17/2010	00-00 PM	

## Document Search

- Filter Options allows you to search documents across Sites enter any information you have about the document.
  - Entering a name or partial name will list any document which contains a portion of the text you entered.
  - The more filter options you define will narrow your search results allowing you to find your document quickly.
- **Document Title** *enter* at least **three letters of the document name** you are wanting to search.
- **Document Type** *place* a **check** in any **Document Type** options to limit your search by document type. *Hold down* the **ctrl key** and **using your mouse** to make multiple selections in the additional types field.
- Document ID every document in iChannel is assigned an ID which is stored in the document properties.
- Full Text | Content Enter text in this field triggers a "full text search" of all the documents in iChannel. Select the sicon to open the Text Search Help window that provides search options and

show examples on how to use the full text | content filter.

- **Year** *select* the **Year drop-down arrow** to narrow your search by a particular year.
- Status select the Status drop-down arrow to narrow your search by status.
- Category *select* the Category drop-down arrow to narrow your search by Topic | Subtopic categories.
- **Created** | **Modified** this field toggles between created and modified dates and has two calendar fields for a beginning and ending date.
- Sort By *select* the Sort By drop-down arrow to narrow your search by Date, File Name, Company, User or File Type.

- User ID provides options for searching by the User ID. The *default* is to search across all users. You can limit it by *selecting* All, Created, Check-Out, or Modified.
- Show Sites with missing documents of the above criteria *check* this box will return any sites that **DO NOT** have the specified criteria defined above.
- Export Search results to text file *check* this box will provide a link on Search Results screen that will display the results as a text file.

*Click* the **Company/Document Search** button. If you choose to not enter any filter options, all documents that you have permission to view will be returned.

- From the Search Results screen you can access the following:
  - Click on the Document Name to open the document
  - Click the Document Operations icon to open the document properties
  - Click on the Site Name to access client CRM screen

6	Files Contacts Calendar Routing Project	s Pipeline	System		Include Inactive Search	*	🕖 🔨 🚨 🛛 Logou
Sea	rch Results					B	ack to Search
	Year Name			Entity	User	Size	Date
٠	🔁 2019 Workflow and Document Management-Merged			Shelby's Bridge Thrift Shop	bobby.underwood	122 KB	07/23/2019
٠	2019 Workflow and Document Management-Merged			Wolf, Bobby(Wolf, Bob)	bobby.underwood	122 KB	07/23/2019
44	2019 Q1-FInancial Stmt-04 05 2019			Shelby's Bridge Thrift Shop	Imagby	129 KB	07/16/2019
	2019 andrew.churilla_07112019152925			Smith Community Mental Health(SMI	TH20) andrew.churilla	11 KB	07/11/2019
	2019 andrew.cnunila_0/112019122459			Smith Community Mentar Health(SML	TH20) andrew.churilla	12 KB	07/11/2019

The File Area Search screen also allows the *combination* of using client **File Area Search options** in conjunction with **Document Search options** to help you narrow the search results.

# S Include File Area Search Criteria

On the Document Search section, check the Include File Area Search Criteria checkbox.

• The File Area Search Included The indicator will display.

			_				NNE
File Area Search				Document Sea	rch		
	Begins Wit	h Exact Match		Include File A	Area Search Criteria.		
Company Name:				x :ument Title:			
FEIN:					Search Description		
Type:				Current Type:	Word Word	A	
Last Modified:		•			Excel	A	SP
Industry:		¥	· · ·		<ul> <li>Powerpoint</li> <li>Pdf</li> </ul>		AB
Partner			G		Email	D	OCX
Group			File Area Search Included	-		D	• TO
Entity			2	Contract ID:			
Manager			5	Full Text/Content		0	
Biller			eau	re <mark>n</mark> r:	•		
Tax ID			SE	St tus:	•		
Expanded Act	ive: YES V		Les	Celegory:		۲	
<ul> <li>Expanded Act</li> </ul>		v Search	le /	Permanent Do	ocuments		
<<	Compan	y search )	Ē	Created • :			
			I				
				Scit By:	Date 🔻		
					Checked-Out Mod	ified	
				Jeer ID:			
				Show Compa	any with missing docu	ments of the above o	riteria.
				Export searc	h results to text file.		
					Company/Documen	ts Search	

**Document Management Table of Contents** 

# \Sigma Document Management Area Overview

A **Central Document Repository** or **Document Management Area** houses all the documents that a user will access in iChannel. The Document Area displays all the data for each Client that is defined in iChannel and the Clients that you have permission to view.

To get to the Document Management Area you have a few options:

- From the **iChannel Dashboard**, locate a Client | Site in a widget and *click* the **File Folder icon**.
- From the **Quick Search** or **File Search** results screen, *click* on the **File Folder icon**.

X	Files	Conta	icts	Calendar	Routing	Projects	Pipeline	System				
🙆 M	ly Dashboa	ard ~										
	My Rec	ent Entiti	es						0			
-	_			Entity			Accessed .	Ranking	0			
	0	Shelby's E	Sridge T	hrift Shop (SB-	0001)		19 hours ago	• ***	*			
	0	Smith Cor	nmunity	Mental Health	(SMITH20)		19 hours ago	•***	*			
		12-01-056	F1 (12	-01-056 F1)			21 hours ago	o tototo	2			
		iChanne <sup>11</sup>		9			Q daw ano					
Т	otal: 4	iChanne	Ģ)	Files	Contacts	Calendar		Projects	-	eline	System	
Т			Searc	Files	Contacts	Calendar	Routing	Projects	-			
Te			Name		Contacts	Calendar	Routing	Projects Nany Type FEIN	Pip	eline Partner 12-01-0	G	
Te			Name	ch Results	Contacts	Calendar	Routing	Projects pany Type FEIN t 12-01-1	Pip 056 F1	Partner	G )56 F1	
τ			Name	th Results		Calendar	Routing Comp Client	Projects bany Type FEIN t 12-01-1 t 12-01-1	Pip 056 F1 057 F1	Partner 12-01-0 12-01-0	G 056 F1 057 F1	

Once you access the Document Management Area, the File Area is defined in three (3) key areas:

- Header | Filter Bar,
- Filter (Topic | Subtopic) Category
- File Listing.

Information displayed in each key area is controlled by your System IT Administrator and Security Group profile.

Files Contacts	Calenda		Routing	) Projects	Pipeline	System	Ś		ARC HANNEL				🗍 Inclu	de Inactive Searc	h	🗧 🕐 🛅 🕹 Loga
Shelby's Bridge Thrift Shop( Title/Description Content	(SB-0001)		Туре	•	Exclude Emails Year	•	Status	•	Filter List All		-	uments here to upl		Heade	r   Fil	ter Bar
Filter	1000	r 💩														
✓ Year / Category ★ Categories: Check/Uncheck All				Title 🕈 change name							Category Fees	Modified	Created By Imagby	Created 07/24/2019	Links	Parent Administrative
Administrative     Billing     Business Dev	1 0	9	2019	FS-Q2-03 13 19			• :	Sample Mo	ving Example	8 k	Financial St	11:40 AM tatemer07/24/2019 10:46 AM	Imagby	07/24/2019		Audit
Business Dev	1 0	Z	2019	Invoice-05012019 Draft	•					442 k	Fees	06/27/2019 11:51 AM	Imagby	06/27/2019		Administrative
Filter	0.0	Þ	2019	Q1-FInancial Stmt	t-04 05 2019		• 201					019	Imagby	06/24/2019	₽	Audit
Parent   Child Category			2019	Q1-Workpapers-0	4 02 2019		• :	Sa	File	LIS	ting	019 M	lmagby	06/24/2019		Audit
Tags:	) •	<b>B</b> 2	2018	Tax Return-02 15	2019		• 201	8-Tax Retu	ırn-Non Profit • Tax Return	8 k	Returns	07/24/2019 11:21 AM	Imagby	06/24/2019		Tax
Project/Opportunity Tax Return	9	Þ	2019	Workflow and Doc Assigned	ument Manager	ment-Merged		• 1040 Tax	Return 2019	122 k	Job File	07/23/2019 9:21 AM	bobby.underwo	od 06/27/2019	i	Bond
Base Folder ADMINISTRATIVE AUDIT BOND				Assigned				1040 /8/	Recom 2019							
Correspondence	c	County	7						Daga L	of 1	100 -	-T Columns				

### 뇌 Document Management Area Overview – iChannel File Header | Filter Bar

The **iChannel File Header | Filter Bar** provides the users with the ability to set-up unique filter options to quickly find document(s) associated with a Site. To search, enter as much or as little in any of the filter options then click **Filter** button to return your results in the File Listing section.

1. Many of the options to search within the Header | Filter Bar section are controlled by your System IT Administration and your Security Group.



- Site Name displays the name of the Site accessed from any folder icon. *Hover* over the name to view the Contact Information. *Click* on the Site Name to go to the Site Detail (CRM) module.
- Discussions and Activities Summary Icon *click* the Information Icon to load the Last 10 Activities and Last 5 Discussions for the Site Name.



Start	Subject	Contacts		
5/25/2010	Subject Descript State	Locy Machy De	and Johnson, Shelby Smith	
4/1/2019	E-Olino	Andrew Charille		
			d b	
		Bobby Underwo	d b	
)	•			
	6/23/2010 8/24/2019 4/1/2019 2/15/2019 2/15/2019 2/15/2019 1/31/2019 User bobby.unde	6222020 Pravidi Renti AV2/2015 Colfornio d'System C 47/2015 Colfornio d'System C 2732/2015 Som 2732/2015 Som 2732/2015 Som 2732/2015 Som 2732/2015 Som 2732/2015 Som User Sabber bolds anderwood Inst Sectors for Inst Sectors Southern Requirem	2022/2023 Finalized better: Lary Hagys, Carl 2022/2023 Finalized better: Lary Hagys, C	2021112 Mindial time Loop Yangh, Gena Salensi, Bahly Hittle     2021112 Mindial time Loop Yangh, Gena Salensi, Bahly Hittle     2021112 Salensi Kangalan Kangala

**3.** Show Activities Icon – *click* the Calendar Icon to load the Activities screen for activities associated with the Site.

## Module 3: iChannel Document Management

Title/Desc	ription Ocont	ent	Exclude Emails	Show Activities
	-	Туре	Year	Status
Activities				
			Filter: All	▼ Timeframe: All ▼ Activity Co Begins with: □ Subject:
Туре	Status	Start	Stop	Subject
🖂 Email	Sent	07/23/2019 04:42 PM	07/23/2019 04:42 PM	Request: 1040 Documentation
	Sent	07/17/2019 09:20 AM	07/17/2019 09:20 AM	Testing IC email
🖂 Email				
i Email Email ⊡	Sent	06/27/2019 12:06 PM	06/27/2019 12:06 PM	Testing IC email

4. Workflow / Pipeline Icon – *click* the Workflow Icon to view all workflow projects associated with the Site. *Click* the **plus icon** to expand the Tasks or click the Workflow name to launch the workflow details screen in a new window.

Title/Description Ocontent		Exclude Emails		Pro	ects/pipeline		Drag docum
The best provided the content	Test	_		Status		ilter List All	
	Туре	• Year	<u> </u>	Status	• •		
Order Project			Priority Type	SubType	Status	Contacts	
Add Refresh							
Include completed Projects Year:	Type:	Sub Type:		•			
Sample Moving Example			Normal Tax	Individual	Not Started	Shelby's Bridge Thrift	Shop
11/0			Horrian Tax	mannada	Not Started	Shelby a bridge mine	
						ADMINISTRATOR USE	R, Lacy Magby
3 1040 Tax Return 2019			Low Tax	Individual		ADMINISTRATOR USE Shelby's Bridge Thrift	
			Low Tax	Individual	In Process	Shelby's Bridge Thrift	Shop
3 <b>1040 Tax Return 2019</b>					In Process	Shelby's Bridge Thrift ADMINISTRATOR USE	Shop
1040 Tax Return 2019			Low Tax Classify		In Process	Shelby's Bridge Thrift ADMINISTRATOR USE	Shop
1040 Tax Return 2019           11/0           Task           Add			Classify	γ Τγς	In Process e Status	Shelby's Bridge Thrift ADMINISTRATOR USE Assigned	Shop R, Bobby Underwoo
Task Task Task Task Refresh Tax Return Note			Classify Sent En	y Typ mail Not	In Process le Status e	Shelby's Bridge Thrift ADMINISTRATOR USE Assigned Bobby Underwoo	Shop R, Bobby Underwood d
13 1040 Tax Return 2019 1/0 Task (Add) (Refresh) Tax Return Note Information In			Classify	y Typ mail Not mail Tas	In Process e Status e k In Proc	Shelby's Bridge Thrift ADMINISTRATOR USE Assigned Bobby Underwoo ess Bobby Underwoo	Shop R, Bobby Underwood d d
1040 Tax Return 2019 1/0 Task Add (Refresh) Tax Return Note Information In Organize Documents			Classify Sent En	y Typ mail Not mail Tasi Tasi	In Process e Status k In Proc k In Proc	Shelby's Bridge Thrift ADMINISTRATOR USE Assigned Bobby Underwoo ess Bobby Underwoo ess Bobby Underwoo	Shop R, Bobby Underwood d d d
Task Task KdB (Refresh) Tax Return Note Information In Organize Documents Scan			Classify Sent En	y Typ mail Not mail Tasi Tasi Tasi	In Process e Status k In Proc k In Proc k Not Sta	Shelby's Bridge Thrift ADMINISTRATOR USE Assigned Bobby Underwoo ess Bobby Underwoo erst Bobby Underwoo rited Bobby Underwoo	Shop R, Bobby Underwood d d d
3     1040 Tax Return 2019       1/0     Task			Classify Sent En	y Typ mail Not mail Tasi Tasi Tasi Tasi	In Process e Status e In Proc c In Proc c Not Sta c Not Sta	Shelby's Bridge Thrift ADMINISTRATOR USE Assigned Bobby Underwoo ess Bobby Underwoo rited Bobby Underwoo rited Andrew Churilla	Shop R, Bobby Underwood d d d
a 3 1040 Tax Return 2019 11/0 Tax Return Note Information In Organize Documents Scan Preparation Detail Review			Classify Sent En	y Typ mail Not mail Tasi Tasi Tasi Tasi Tasi	In Process e Status e In Proc c In Proc c Not Sta c Not Sta c Not Sta	Shelby's Bridge Thrift ADMINISTRATOR USE Assigned Bobby Underwoo ess Bobby Underwoo rited Bobby Underwoo rited Andrew Churilla	Shop R, Bobby Underwood d d d
3         1040 Tax Return 2019           11/0         Task           CAdd (Extressh)         Tax Return Note           Information In         Organize Documents           Scan         Preparation			Classify Sent En	y Typ mail Not mail Tasi Tasi Tasi Tasi	In Process Status Status In Proc In Proc In Proc Not State Not State	Shelby's Bridge Thrift ADMINISTRATOR USE Assigned Bobby Underwoo ess Bobby Underwoo rited Bobby Underwoo rited Andrew Churilla	Shop R, Bobby Underwood d d d

5. IC Email Icon – *click* the Mailbox Icon to open the Email screen. Emails that have been forward will appear in the email section. From this screen, you can: Search Emails, Create, Delete Emails, Change Category, Change Site Code, Attach to a Workflow for emails.

Title/Description Content		Exclude Em Type + Year	als Crange decaments have to spload or	
Search Criteria	*	Email > 3 emails	(New Enail) (Delete) (Change Category) (Change S	Re Code) ( Attach To Projec
From	8	Subject	From/Ta/CC Tag/Category	R Sent/Recd
70 III		Request: 1040 Documentation	bobby.underwood@conserc.com bobby.underwood@conserc.com Tax - Returns	07/23/2019 04:42 pm
Search	0	Testing IC email	🗢 bobby.underwood@constrc.com bubby.underwood@constrc.com Administrative - tilling	07/17/2019 09:20 am
Sent/Recd V Apply Filter (List All)		Testing IC email	bobby.underwood@constrc.com bobby.underwood@constrc.com	06/27/2019 12:06 pm
(address and a second s	Pag	es: 1		
10 Tag	¥			
Category	8			
E From/To/CC	8			
Max Records per Page 50				

- Add New Icon *click* the Folder Icon to access an additional option to add new documents into iChannel. From this screen you can:
  - Add Document to be Scanned (generate routing slip)
  - Request Documents (Copy to Clipboard)
  - o Copy Permanent Request Files Link to Clipboard
  - Add Hyperlink(s) (to any URL or other File Area)
  - Recatalog (Rebuild the file area)

Generate & View Thumbnails of any Images (JPG's)



- Pad Lock Icon: Site Permission The Lock Icon is controlled by your System IT Administrator and Security Group and is typically for iChannel Administrator. *Click* the lock icon to customize the security settings for this Site.
- "Double-down"- "Double-Up" Arrows *click* the Double-down Arrows to Show Advance Search Filter options. *Click* the Double-Up Arrows to Hide Advance Search Filter options.



 Title/Description/Content field – Type drop-down – to easily search for a document by either Title/Description or Content. Enter at least a MIN of 3 characters to start the search. Click

"Enter" or *click* the Filter button to return your results.

10. Type | Year | Status Search filters – click the Type drop-down arrow to select or multi-select the type of document you want to include in your search. Click the Year drop-down arrow to select or multi-select a year to include in your search. Click the Status Search drop-down arrow to select or multi-select the status to include in your search.

Title/Description     Content		F									
			Туре	٥	) (	Year	٠	Status	כי	Filter List All	1.1
		İ	<ul> <li>Check all</li> <li>Uncheck all</li> </ul>	8		Check all	8	Check all			
Filter 📢	<b>d</b> (	9	Caseware	) ^		2022	<b>^</b>	Normal (	1		
¥ Year ∕ Category		l	Email			2021		Draft	1	Modified	0
Categories:		Þ	Excel		me	2020		Final/Locked		07/24/2019	Ima
Check/Uncheck All     Administrative		L	Graphics			2019		To Be Deleted		11:40 AM	
Audit		L	PDF	- 1	•	2018	<u>j</u> e		-		
Bond		P	Powerpoint		13	017	-	8 k Financial S	Stat	emer 07/24/2019 10:46 AM	Ima
▷ Tax		Þ	QuickBooks		601	2019		442 k Fees		06/27/2019	Ima
			Word Word							11:51 AM	
Project/Opportunity		8	🔲 AI		ial:	Stmt-04 05 2019		129 k Financial S	Stat	emer 07/16/2019 9:28 AM	lma
Tax Return			ASP ASP		ed					51207111	
	-	ь	CAB			8-Tax Return-Non	Profit				
🗏 🥥 Base Folder		ľ	Exe		ape	ers-04 02 2019		129 k Audit Wor	kpa	pers 07/24/2019 11:36 AM	Ima
ADMINISTRATIVE		L	FRT FRT			Sample Moving Ex	amnle				
🖾 AUDIT		b	FRX			2 15 2019	ampre	8 k Returns		07/24/2019	Ima
POND.		-		_	-					11:21 AM	

11. Filter List All - click the Filter button to search for document(s) based solely on your defined search options. Click the List All button to search for "all" documents associated with the Entity and not based on any search option(s) defined.

- a. The **Filter** button can also be used to streamline your search results in conjunction with **Filter Topic | Subtopic Category** section.
  - i. Place a *check* in a **Categories** or **Tag** checkbox, next *click* the *Filter* button. The File Listing area will only return results for documents that match your criteria.

Title/Description     Content		Туре		•	Exclude Emails Year 0 Sta	Filter List All			wie wie				
filter	*	d) -	8.2										_
¥ Year / Category		0	💌 Тур	e Year	Title 0		Size	Category	Modified	Created By	Created	Links	Parent
Categories:     Check/Uncheck All     E    Administrative		•	• 2	2019	change name		85 k	Fees	07/24/2019 11:40 AM	Imagby	07/24/2019		Administrativ
Audit						<ul> <li>Sample Moving Example</li> </ul>							
Dond Tax			• 1		Invoice-05012019 Draft		442 8	k Fees	05/27/2019 11:51 AM	Imagby	06/27/2019		Administrativ
Tags:    Project/Opportunity     Tax Naturn	Edit		•	2018	Tax Return-02 15 2019	• 2018-Tax Return-Non Profit • Tax Return	81	k Raturns	07/24/2019 11:21 AM	Imagby	06/24/2019		Тах



12.

- to quickly add a Document to the File Listing area, *click* the **Browse** button to add a document from your computer. In addition, you can quickly *drag-and-drop* a document by dragging into the document area.

- *Click* the Browse button or Drag-and-drop a document into the gray box area. The **Choose a File to Upload** window opens.
- *Navigate* and/or *Select* the file from your file management area.
- Click Open. The Add Document(s) window will open.
- In the **Change Properties** area, update the following areas as necessary:
  - Update the **Title**, if necessary.
  - Change Properties: *select* the **properties (Parent | Child Category)** to apply to the document.
    - All documents are required to be assigned to a Topic | Subtopic Category
  - Target Subfolder:
    - If the subfolder of the document being added needs to be updated, select the Target Subfolder drop-down.

Document Management Table of Contents

## L iChannel Document Management Area Overview – iChannel Filter Topic | Subtopic Category

The **iChannel Filter for Topic | Subtopic Categories** allows for every document that is always housed within iChannel be associated with at least *one (1) Topic category* and at least *one (1) Subtopic category*. Having each document that is housed in iChannel associated with a topic | subtopic category allows for every document to easily be searched and/or filtered, shared or retrieved in the File Listing section. Additionally, you can filter specific documents by Categories to share quickly with internal associates

or external clients. The Category feature also provides additional security around your documents not only in iChannel but with the iChannel Portal.

# Overview: iChannel Filter Topic | Subtopic Category

Action



- Filter: Categories there are no limits to the number of Topic | Subtopic Categories. Yet, all Topic Categories must have at least one (1) Subtopic category. The Category structure is defined and maintained for consistency with the use of a "template". Your Administrator and iChannel Support | Implementation team will work together to ensure your structure adheres to your organization needs for document management.
  - Examples of Topic Category Filters are listed below but not limited to:
    - Administrative, Audit, Data Analysis, Engagement, Litigation, Tax
  - Examples of Subtopic Category Filters are listed below but not limited to:
    - Billing, Business Development, Correspondence, Engagement Letter, Legal, Notices, Returns, Workpapers

2. **Filter: Tags** – tags are custom for each Site's Document Management Area and can be arranged in a multi-level tier. The *top level* is called the **Topic Documents Tag** and the *lower level* is called the

**Subtopic Document Tag**. Tags provide the user an optional identifier to assign to a document beyond the Topic | Subtopic Category.

• Tags can also be used in your iChannel File Header | Filter Bar search options to assist with quickly finding document(s) for a Site.

Document Management Table of Contents

## iChannel Document Management Area Overview – File Listing

The **iChannel File Listing** provides the user with all documents that are associated with the Entity. User's will spend a great deal of their time working in the document area as the File Listing area provides many features to performs actions on documents. Additionally, the iChannel File Listing area also provides a Requested Files area for users to view, accept, reject and/or email documents that have been submitted by your Clients.

To assist with easily viewing and finding your documents, the iChannel File Listing area can be *customized* to **display columns** and to **sort your columns A-Z or Z-A** by column heading.

• Many of the options to search within the Header | Filter Bar section are controlled by your System Administration and your Security Group profile.

\$ ·	*	Request	Year		Title				9	ize Reject	Created By	Last User	Modified 🜩	Created
	2-3	19 🔁	2019 Tes	st PDF - Copy.pdf			Unlo	:k		? <b>X</b>	Arasmith.Cher	ie@)	04/29/2019 4:17 PM	04/29/2019
ocumen	nt Cou	nt: 1				🖂 🖂 Page 1 of 1 🤛	►1 100 ¥							
3														
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۲		Version and Open		DocuSign ESign Document			12 k	Billing	04/03/2019 1:35 PM	andrew.churilla	04/03/2019	Administra	tive	
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۲	2	2019 Doc-05152		Copy to Folder(Append)			?	Engagement Mgm	t 04/19/2019 2:55 PM	Smith.John@Local	04/19/2019	Administra	tive	
۲		2019 Document f	from the	Copy to Folder(Replace)			129 k	Communic 1	05/29/2019 10:34 AM	Imagby	05/29/2019	Audit		

In the File Listing window, three learning exercises will be covered:

- 1. File Listing Column feature
- 2. Document Feature(s) Action icon
- 3. Multiple Document Feature(s) Gear Icon

# iChannel Document management Area Overview: Column Feature Overview: iChannel File Listing Column Feature

#### Action

Columns – in the File Listing area, *locate* and *click* the Column icon. The Select columns window will display. *Click* the "arrow" in the Select title bar to display all column options. Place a *check* next to the column(s) to add to your File Listing view or *uncheck* a column to remove a column from your File Listing area.

	Q *			Title 0	Select columns	_	ategory	Modifie
2	۲	2	2019	2 \$D0C0000204_1	7 selected	•		01/01/190 12:00 AM
	•		2019	ABC Test iChannel file download-Secure Ke	Check all 💥 Uncheck all	O K	Communication	06/26/201
				ichannelmail@conarc.com Ter andrew.churi	I Size	1.		1:57 PM
	۲	2	2019	Abercrombie Approved EULA	Category		Billing	06/26/20
		-		Accepting Files from Clients Is Quick	✓ Hodified		Correspondence	1:28 PH
					Created By		Correspondence	1:50 PM
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	۲	9	2020	April		k	Billing	04/03/20 1:35 PM
	۲	E)	2018	April	Cancel Ok	k	Financial Stateme	05/03/20
	۵	-	2019	April-04162019			Billing	02/19/20 1:40 PM
	ų.	12	2019	Assign documents to the proper parent and ch	ild category	129 k	Bank Documents	04/29/20
				Assigned	Global Tags      Entity Specific Tags     Sub Lavel      Multiple Levels      Lacy's Documents			1:59 PM
	۲	2	2019	Change Name		129 k	Workpapers	06/14/20 3:22 PH
	۲	1	2019	Completed New Signature Request dsa_demo@docusign.net To: andrew.churilla@	conarc.com	248 k g	Bank Documents	
	۲	B	2019	Doc-05152019		?	Engagement Mgm	104/19/20 2:55 PM
	۲	2	2019	Document from Client		129 k	Communication	
								100

**Document Management Table of Contents** 

<b>Overview:</b> A	ction Icon	
Action		
additional infor Click the Action	ture(s) – Action Icon – iChannel provides several features to view rmation about a document that is in the iChannel File Listing area.	2019 Invoice-05 Draft      Document Properties      Copy Internal Link     Document History     Discussions     Assign Tags      Version and Open     Check-Out     Permissions
	Assign Tags Version and Open	
	Check-Out	
	Permissions	

## 뇌 iChannel Document Management Area Overview: File Listing – Icons



# 1. File Listing Icon: Direct Editing | Stream Mode Editing | Off-line Editing

iChannel supports two (2) modes when editing documents.

- Direct Mode indicates that the user is accessing the documents directly attached to iChannel or via Citrix, Terminal Server, or VPN.
- Stream Mode indicates that the user is accessing the document(s) remotely, via the web.

The mode you are working in determines how you edit document(s) in iChannel. You can change the mode in iChannel by clicking the below icons. These icons perform as toggle switches to move between direct and stream modes. The ability to toggle is controlled by your System IT Administrator | Security Group profile

*i***CHANNEL** 

# Module 3: iChannel Document Management

Document mode is Direct (Internal) - Click to toggle	
S C C C Document mode is Stream (External) - Click to toggle	

Document mode is Direct (Internal)

Document mode is Stream (External)

# 2. File Listing Icon: Document Email Notification for iChannel

*Click* **Email Notification** icon to list Subscribers | Portal Subscribers associated with the File Area. Individuals listed from the Subscribers Email List, Portal Subscribers will be notified every time you check-out, check-in, and/or delete from this File Area.

ese individuals will be notified e	very time you check-out, check-in, add or delete from this File Area.
from this File Area	
Subscribers Email List: To select multiple email address 2fa@conarc.com ==== Subscribers ==== U.Karshakou@sam-solutions.cc andrew.churilla@conarc.com bobby.underwood@conarc.com	
Extranet Subscribers: ==== Subscribers ==== Clay@firstbankichannel.com John@legalhelpichannel.com Shannon@sbichannel.com	•
Current notification list asso Specify additional emails for the	ciated with this File Area: a CC list to associate with this File Area. Please separate email addresses by ';' .

## 뇌 3. File Listing Icon: Hide Tags

*Click* **Hide Tags** if you do not want to see any assigned tags in the File Listing area by documents. This icon performs as toggle switches to either **Hide** or **Show** Tags in the File Listing area.



# $\sum$ 4. File Listing Icon: Turn ON preview for Emails and PDFs

*Click* **Turn ON preview for Emails and PDFs** icon enable the preview options for Emails and PDFs.



This icon performs as a toggle switches to either Turn On preview for emails and PDFs or to Turn Off preview for emails and PDFs.

**Document Management Table of Contents** 

# Module 3: iChannel Document Management

# **iCHANNEL**





Hover over the Action <sup>(N)</sup> icon, the action list will display. Click Document
 History.

iChannel logs "all" actions (history) for every document in the Document History summary.

Document Properties

Copy Internal Link Document History Discussions

Version and Open Check-Out Permissions

Assign Tags



The history logs follow all actions for each document and always includes the **Date | Time** and **User ID**:

- Viewed both intranet and portal access.
- Check-Out | Check-In the user that checked-out | checked-in the document and the date | time.
- Versioned if version control is active, included the version number and any comments
- **Emailed** includes list of attachments, recipients, & password of .zip file, if a password was set on the .zip file.
- Emailed as Link includes list of attachments, recipients, expiration date, number of downloads allowed, number of downloads used, and secure key.
- Published includes the site code and channel | topic published to the iChannel Portal.
- Unpublished
- **Category | Year Changed** includes any previous values associated with the document.
- **Status Change** includes the previous document status and any changes to the document status by a user.
- **PDF Merge** any .pdf documents where a user has merged the, will be listed in the history to show what and when documents were merged.

**Document Management Table of Contents**


(Post Message) (Cancel)	
Subject: (Add New)    System Requirement Spec Overview  Note: Conversation with client IT department on System Requirement Spec Overview	
Send email to selected contacts	-6
Include content (Uncheck to send ONLY a notification. Requires login to iChannel to view the content of this discussion.)          Available Contacts       Selected Contacts         Channin, Sharon       Defensed, Bobby         Channin, Andrew       Defensed, Bobby         Date, Barnes       Contacts         Last:       Error         First:       Error	th@gmail.com

**Document Management Table of Contents** 

# ڬ Document Feature: Assign Tags



# iCHANNEL



**Document Management Table of Contents** 

## \Sigma Document Feature: Version and Open

Step	Action	
•	before	ning is the process in iChannel that allows for making a back-up-copy of the documer users begin to make any changes to the document. When a user creates a version, th t document is copied and placed in the document history as a hyperlink with the versio
	and O	Document History Discussions
		The Document Versioning window box opens.
		To version a document, click the Version Document) button. The
	2.	version and open
	2.	following message will display. Next, <i>click</i> the <b>Click Here link</b> to
	2.	version and open



### ڬ Document Feature: Off-Line Editing

There are circumstances where you might need to access or edit document(s) when you are not in the office or connected to your network. The **Check Out – Check In** feature manages that process.

Doc	ument Feature: Check-Out
	on Icon – Check-Out
Step ()	Action Checking out a document is a vital function when working in today's mobile workforce. Documents are checked-out and a copy of that document is saved locally (or where the users determines best to save the document). When a document is <b>checked-out</b> , the document in iChannel is set to <b>read-only</b> .
	There are comment fields in each step of the check-out process which will be helpful for other users who also have access to the same document.
	Hover over the Action 🐑 icon, the action list will display. Click Check-Out.
	The <b>Document Check-Out</b> window box opens.
	Contract Calculation     Contract Calculation
	3. Click Check-Out to check-out the document without defined any Check-Out Options.
	<ol> <li>In the Document selected for check-out section, the document(s) to be checked-out will display.</li> <li>In the Check-out Options section:         <ul> <li>a. (Optional) Check the Get Zip checkbox if you want to Create a zip file containing the checked-put document(s).</li> </ul> </li> </ol>



- c. (Optional) *Enter* **Comments** about what you will do with the document while it is checked-out. Comments are included in the email notification and will be saved in the document history.
- d. (Optional) **Email Notification**, select from list an email to send an email notification to additional internal or external users.
- e. (Optional) *Check* the **Attach the document to Email** checkbox if you would like to attach the document(s) to the email.
- 6. *Click* to check-out the document(s). The indicate the document(s) have been checked-out.

**Document Management Table of Contents** 

## 뇌 Document Feature: Check-In

Attach the document to Ema



donne<sup>m-1</sup>

- 3. Click Quick Check In the document without defining any Check-In Options.
  - 4. The Title, File Name and Checked-Out By are pre-populated with information about the Checked-Out document.
  - 5. In the Section Action, select one of the following:
    - a. **Check-In** Updates and unlocks the document. Version is saved and Document History is updated.
    - b. **Check-In and Check-out** Updates and keeps the document locked. Version is saved and Document History is updated.
    - c. **Cancel Check-out** No change is made and releases the lock on the document. No version is saved.
  - 6. Upload File *click* the Choose File to locate the document. *The Document must match the checked-out file name.*
  - 7. In the Check-In Options section:
    - a. (Optional) *Enter* **Comments** about what you will do with the document while it is checked-out. Comments are included in the email notification and will be saved in the document history.
    - b. (Optional) **Email Notification**, select from list an email to send an email notification to additional internal or external users.
    - c. (Optional) *Check* the **Attach the document to Email** checkbox if you would like to attach the document(s) to the email.
  - 8. *Click* Check-in to check-in the document(s). The icon will update to to indicate the document(s) have been checked in.

#### **Document Management Table of Contents**

#### Document Feature: Permissions

Actio	on Icon – Permissions						
Step	Action						
٠	All document(s) held in iChannel are controlled by Group F	Permis	ssions. A list of Security				
	Permissions by Group and Features:						
	All features						
	View Document		Document Properties				
	Discussion Notes		Copy Internal Link				
	Document History     Document History						
	Email Notification     Discussions						
	Check-In/Out						
	Publish Document		Assign Tags				
	Email Documents						
	Permissions		Version and Open				
	Copy/Transfer		Chock-Out				
	Move		Permissions				

#### Unlock

•

Delete Document

,, -	be granted the document ma	nagement features below.	Check the appropriate optio	ns and press any 'Save Pern	nissions' button to save	the setti
Employee						
All Features	Uncheck All 🛛 Override (	Global/Site/Subfolder Permis	sions			
Document Functio	ns View Document	Discussion Notes Email Documents	Document History Permissions Skelta	Email Notification	Check-In/Out	Save
	Uncheck All 🛛 Override (	Global/Site/Subfolder Permis	sions			
Document Functio	ns 🗌 View Document	Discussion Notes Email Documents	Document History Permissions	Email Notification Copy/Transfer	Check-In/Out	

Your organization will determine your Security Permission by Group and Features. Therefore, certain Group Permissions for Document(s) might not be within your access or viewable.

If you feel you should have access to any feature, please contact your System IT Administrator.

**Document Management Table of Contents** 

# **iCHANNEL**

#### 🕥 iChannel Document Management Features

The **iChannel Document Management Feature (Gear Icon)** provides the user the ability to perform a series of features on a document, or even perform a series of multiple features to documents at once.



Your organization will determine what Document Management Features (Gear Icon) functions you have permission rights to perform on a document.

If you feel you should have access rights to perform any of these functions, please contact your System IT Administrator.



# 뇌 Document Feature: Email

Gear Icon – Email							
Step	Action						
<b>*</b> •	Select a document(s) from the File Listing area. Hover over the Gear icon, the action list will display. Click Email.						
	The Compose Email window will display.       Copy to Zip       Assign Status       Do            •          •          •						
	Depending on your <b>Security Group</b> permissions, a few available <b>Copy Internal Link</b> actions are:						
	<ul> <li>From: - by default, the sender's email address will be displayed. The BCC Sender checkbox will be checked by default. If you do not want to receive a copy of the email in your company Email Inbox, deselect this option.</li> <li>To   Cc   Bcc: - from the Client Contacts section, select contacts to send the document to by highlighting a contact, then click the " &lt;&lt; " next to the appropriate field.         <ul> <li>If a contact does not appear in the Client Contact list, you can manually enter an email address in any of the fields.</li> </ul> </li> <li>Subject (Required) - enter a description for the subject of the email.</li> <li>Email Category (Optional) - in the Select Category drop-down list, select a Topic   Subtopic category to tag the email. This will place a copy of the email in the File Listing.</li> <li>Body - enter any additional email text you want to send with your email.         <ul> <li>If sending documents as a secure link, do not remove the "Document Links will display here"</li> </ul> </li> </ul>						

# **iCHANNEL**

Attached File Info: - there are two (2) options when attaching and sending an email:         • Zip Attachments: - if checked, the document will be .ZIP when attached to the email         • (Optional) – you can secure the .ZIP file enter a password in the Secure Zip file with password (optional) field.         • Send as a Link – if checked, the document will be sent as a link. Additional security options that you can apply:         • No. of Downloads – the default number is 2. If you want to allow more or l downloads, update the field.         • Link Expires on – click the calendar icon to change the date when the link v expire.         • Security Key – iChannel will default a Security Key, if you want to set your of Security Key, enter a new password in the field.         • Via – there are three options when sending the Security Key to your email contact:         • Do not email         • Some email (Admin Only)					
Attached File Info: - there are two (2) options when attaching and sending an email:         • Zip Attachments: - if checked, the document will be .ZIP when attached to the email         • (Optional) – you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.         Image: Send as a Link – if checked, the document will be sent as a link. Additional security options that you can apply:         • Send as a Link – if checked, the document will be sent as a link. Additional security options that you can apply:         • No. of Downloads – the default number is 2. If you want to allow more or lownloads, update the field.         • Link Expires on – click the calendar icon to change the date when the link vexpire.         • Security Key – iChannel will default a Security Key, if you want to set your of security Key, enter a new password in the field.         • Via – there are three options when sending the Security Key to your email contact:         • Do not email         • Separate email	Compose Email				
Attached File Info: - there are two (2) options when attaching and sending an email:         • Zip Attachments: - if checked, the document will be .ZIP when attached to the email         • (Optional) – you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.         Image: Send as a Link – if checked, the document will be sent as a link. Additional security options that you can apply:         • Send as a Link – if checked, the document will be sent as a link. Additional security options that you can apply:         • No. of Downloads – the default number is 2. If you want to allow more or lownloads, update the field.         • Link Expires on – click the calendar icon to change the date when the link vexpire.         • Security Key – iChannel will default a Security Key, if you want to set your of security Key, enter a new password in the field.         • Via – there are three options when sending the Security Key to your email contact:         • Do not email         • Separate email		From :	bobby underwood@conarc.com		
Attached File Info: - there are two (2) options when attaching and sending an email:         • Zip Attachments: - if checked, the document will be .ZIP when attached to the email         • (Optional) - you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.         Image: Send as a Link - if checked, the document will be sent as a link. Additional security options that you can apply:         • No. of Downloads - the default number is 2. If you want to allow more or lownloads, update the field.         • Link Expires on - click the calendar icon to change the date when the link vexpire.         • Security Key - iChannel will default a Security Key, if you want to set your of security Key, enter a new password in the field.         • Via - there are three options when sending the Security Key to your email contact:         • Do not email         • Separate email					
<ul> <li>Attached File Info: - there are two (2) options when attaching and sending an email:</li> <li>Zip Attachments: - if checked, the document will be .ZIP when attached to the email</li> <li>(Optional) - you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.</li> <li>Send as a Link - if checked, the document will be sent as a link. Additional security options that you can apply:</li> <li>No. of Downloads - the <i>default</i> number is 2. If you want to allow more or loovnloads, update the field.</li> <li>Link Expires on - <i>click</i> the calendar icon to change the date when the link v expire.</li> <li>Security Key - iChannel will default a Security Key, if you want to set your of Security Key, enter a new password in the field.</li> <li>Via - there are three options when sending the Security Key to your email contact: <ul> <li>Do not email</li> <li>Separate email</li> </ul> </li> </ul>			required	**	Client Contacts
<ul> <li>Attached File Info: - there are two (2) options when attaching and sending an email:</li> <li>Zip Attachments: - if checked, the document will be ZIP when attached to the email</li> <li>(Optional) - you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.</li> <li>Send as a Link - if checked, the document will be sent as a link. Additional security options that you can apply:</li> <li>No. of Downloads - the <i>default</i> number is 2. If you want to allow more or I downloads, update the field.</li> <li>Link Expires on - <i>click</i> the calendar icon to change the date when the link v expire.</li> <li>Security Key - iChannel will default a Security Key, if you want to set your of Security Key, enter a new password in the field.</li> <li>Via - there are three options when sending the Security Key to your email contact: <ul> <li>Do not email</li> <li>Separate email</li> </ul> </li> </ul>		Ce:		**	Donna Johnson (donna@sbichannel.com)
<ul> <li>Attached File Info: - there are two (2) options when attaching and sending an email:</li> <li>Zip Attachments: - if checked, the document will be .ZIP when attached to the email</li> <li>(Optional) – you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.</li> <li>wided File info: - there are two (2) options when attached to the email of the secure Zip file with password (optional) field.</li> <li>Send as a Link – if checked, the document will be sent as a link. Additional security options that you can apply:</li> <li>No. of Downloads – the <i>default</i> number is 2. If you want to allow more or lownloads, update the field.</li> <li>Link Expires on – <i>click</i> the calendar icon to change the date when the link v expire.</li> <li>Security Key – iChannel will default a Security Key, if you want to set your of Security Key, enter a new password in the field.</li> <li>Via – there are three options when sending the Security Key to your email contact: <ul> <li>Do not email</li> <li>Separate email</li> </ul> </li> </ul>		Boo :	bobby underwood@conarc.com	**	John Carperter (John@legalhelpichannel.com)
Attached File Info: - there are two (2) options when attaching and sending an email:         • Zip Attachments: - if checked, the document will be .ZIP when attached to the email         • (Optional) – you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.         Image: Secure 2 is a secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.         Image: Secure 2 is a secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.         Image: Secure 2 is a secure the default number is 2. If you want to allow more or in downloads, update the field.         Image: Security Key – iChannel will default a Security Key, if you want to set your or Security Key, enter a new password in the field.         Image: Security Key – iChannel will default a Security Key, if you want to set your or Security Key, enter a new password in the field.         Image: Security Key – iChannel will default a Security Key, if you want to set your or Security Key, enter a new password in the field.         Image: Security Key – iChannel will default a Security Key to your email contact:         Image: Do not email         Separate email		Subject :			
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<ul> <li>Zip Attachments: - if checked, the document will be .ZIP when attached to the email         <ul> <li>(Optional) – you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.</li> </ul> </li> <li> <ul> <li>Intervel File info</li> <li>(2019/06/001 Filescal transmes #5-02.01 to 19.7242019 state)</li> <li>Send as a Link – if checked, the document will be sent as a link. Additional security options that you can apply:             <ul> <li>No. of Downloads – the <i>default</i> number is 2. If you want to allow more or loownloads, update the field.</li> <li>Link Expires on – <i>click</i> the calendar icon to change the date when the link vexpire.</li> <li>Security Key – iChannel will default a Security Key, if you want to set your or Security Key, enter a new password in the field.</li> <li>Via – there are three options when sending the Security Key to your email contact:</li></ul></li></ul></li></ul>					
<ul> <li>Zip Attachments: - if checked, the document will be ZIP when attached to the email         <ul> <li>(Optional) – you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.</li> </ul> </li> <li>Intervent File file (December 4 (December</li></ul>					
<ul> <li>Zip Attachments: - if checked, the document will be ZIP when attached to the email</li> <li>(Optional) – you can secure the ZIP file, enter a password in the Secure Zip file with password (optional) field.</li> <li>Internet Fields</li> <li>Send as a Link – if checked, the document will be sent as a link. Additional security options that you can apply:</li> <li>No. of Downloads – the <i>default</i> number is 2. If you want to allow more or downloads, update the field.</li> <li>Link Expires on – <i>click</i> the calendar icon to change the date when the link vexpire.</li> <li>Security Key – iChannel will default a Security Key, if you want to set your of Security Key, enter a new password in the field.</li> <li>Via – there are three options when sending the Security Key to your email contact:         <ul> <li>Do not email</li> <li>Separate email</li> </ul> </li> </ul>					
<ul> <li>Zip Attachments: - if checked, the document will be .ZIP when attached to the email         <ul> <li>(Optional) – you can secure the .ZIP file, enter a password in the Secure Zip file with password (optional) field.</li> </ul> </li> <li>Intervent File Info:         <ul> <li>(000000000000000000000000000000000000</li></ul></li></ul>					
<ul> <li>options that you can apply:</li> <li>No. of Downloads – the <i>default</i> number is 2. If you want to allow more or downloads, update the field.</li> <li>Link Expires on – <i>click</i> the calendar icon to change the date when the link wexpire.</li> <li>Security Key – iChannel will default a Security Key, if you want to set your of Security Key, enter a new password in the field.</li> <li>Via – there are three options when sending the Security Key to your email contact: <ul> <li>Do not email</li> <li>Separate email</li> </ul> </li> </ul>	0	(Optional) file with p Attached File Info 1 Document is attach FS-02 (2019) Zip Attachme Secure Zip file with	) — you can secure th password (optional) ad <sup>83</sup> 40 <sup>83</sup> 19 <sup>84</sup> 0001-Financial Statements-FS-02-03 13 19-72420 nts:	e .ZIP file, <b>ente</b> field.	
<ul> <li>Security Key, enter a new password in the field.</li> <li>Via – there are three options when sending the Security Key to your email contact: <ul> <li>Do not email</li> <li>Separate email</li> </ul> </li> </ul>	options t o	hat you ca <b>No. of Do</b> download <b>Link Expir</b> expire.	an apply: wnloads – the <i>defau</i> s, update the field. es on – <i>click</i> the cale	<i>lt</i> number is <b>2</b> . Endar icon to ch	If you want to allow more or nange the date when the link w
<ul> <li>Via – there are three options when sending the Security Key to your email contact:</li> <li>Do not email</li> <li>Separate email</li> </ul>	0	Security K	ey – iChannel will de	efault a Security	y Key, if you want to set your o
<ul> <li>Via – there are three options when sending the Security Key to your email contact:</li> <li>Do not email</li> <li>Separate email</li> </ul>		-			
contact: <ul> <li>Do not email</li> <li>Separate email</li> </ul>		-			
<ul><li>Do not email</li><li>Separate email</li></ul>			e are three options v	when senaing t	he security key to your effall
<ul> <li>Separate email</li> </ul>		contact:			
•		• D(	o not email		
•		■ C4	narate email		
<ul> <li>Same email (Admin Only)</li> </ul>			•		
		■ Sa	ime email (Admin O	nıy)	
	No. of Downloads	л	Link Expires on 08/01/2019	Security Key 39925114	Ve Separte enal • Selont Sero Topion Do not enal
2 08/01/07/9 🖬 399/25114 Separate anal 💌					Separate email Same email (Admin Only)
No. d'Dominada Luk Egints on Beculty Key Via 2 00.01.0209 E Sports et al Construction of the sport et al					
No. d'Domitada Liné Expites on Security Rey Via 2 08.01/2019 E 19955114 Seguré email Calce Serve Expite Serve Expite Email Seguré email Seguré email Seguré email	Ser	nd			
No. of Domitads     Link Express on     Security Key     Via       2     06/07.0019     III     Space mail     Index core doors       Decent enail     Decent enail     Decent enail     Decent enail       Securit     Securit     Security (Admin Oct))	<ul> <li>Click</li> </ul>	💻 , the <b>E</b>	mail Send Status wil	l display.	
No. of Downloads     Link Epites on     Security Ray     Via       2     00/01/2019     Image: Security Ray     Seguret email     Security Ray       2     00/01/2019     Image: Security Ray     Seguret email     Security Ray       2     00/01/2019     Image: Security Ray     Security Ray     Security Ray       2     00/01/2019     Image: Security Ray     Security Ray     Security Ray       2     00/01/2019     Image: Security Ray     Security Ray     Security Ray       2     00/01/2019     Image: Security Ray     Security Ray     Security Ray       2     00/01/2019     Image: Security Ray     Security Ray     Security Ray       2     00/01/2019     Image: Security Ray     Security Ray     Security Ray       3     00/01/2019     Image: Security Ray     Security Ray     Security Ray       5     Security Ray     Security Ray     Security Ray     Security Ray					
No. of Domitods     Link Expires on     Security Key     Via       2     0x010/2019     Image: Constraint of Constraints     Security Key     Via       2     0x010/2019     Image: Constraints     Security Key     Via       3     0x010/2019     Image: Constraints     Security Key     Via					
• Click Send , the Email Send Status will display.	Depending	on the op	otions defined in tl	he Attached F	ile Info: field, the recipient
No. of Downloads     Link Explores on     Security Nay     Via       2     BX0.00019     Image: Security Nay     Segurate email     Image: Security Nay       2     BX0.00019     Image: Security Nay     Security Nay     Security Nay       2     BX0.00019     Image: Security Nay     Security Nay     Security Nay       2     BX0.00019     Image: Security Nay     Security Nay     Security Nay       2     BX0.00019     Image: Security Nay     Security Nay     Security Nay       3     Security Nay     Image: Security Nay     Security Nay     Security Nay		-			•
<ul> <li>Click Send</li> <li>the Email Send Status will display.</li> </ul>	receive eith	כו טוופ טו	LWU EIIIdiis.		

**1.** How to open the secure document email. *Click* the <u>Document Link</u> in the email.



2. If you selected to send the Security Key in a separate email, the Secure Key will be listed in **bold**.



**Document Management Table of Contents** 

# \Sigma Document Feature: Request Docs

Gear Icon – Request Docs						
Step	Action					
\$ ×	There are times a user needs to request a document(s) from other co-workers or clients. Use the <b>Request Docs</b> feature to send an email to your recipient(s).	Provil     Provila     Provila     Provila     Provila     Provil     Provil     Pr				
	Select a <b>document(s)</b> from the File Listing area. Hover over the <b>Gear icon</b> , the action list will display. Click <b>Request Docs.</b>	Assign Tags Merge PDFs ie Secure PDFs Copy Internal Link				
	The <b>Compose Email</b> window will display.					
	<ul> <li>Depending on your Security Group permissions, a few available actions are:</li> <li>From: - by default, the sender's email address will be displayed. The BCC Send checkbox will be checked by default. If you do not want to receive a copy of the in your company Email Inbox, deselect this option.</li> <li>To   Cc   Bcc: - from the Client Contacts section, select contacts to send the d to by highlighting a contact, then click the " &lt;&lt; " next to the appropriate field.</li> <li>If a contact does not appear in the Client Contact list, you can manual an email address in any of the fields.</li> <li>Subject (Required) - enter a description for the subject of the email.</li> <li>Email Category (Optional) - in the Select Category drop-down list, select a Pa Child category to tag the email. This will place a copy of the email in the File L</li> <li>Body - enter any additional email text you want to send with your email.</li> <li>If sending documents as a secure link, do not remove the "Docume</li> </ul>					
	<ul> <li>will display here"</li> <li>Expires – enter an expiration date for Request Docs required</li> </ul>	uest to be active.				
	$\sim$					

# **iCHANNEL**

• Click send , the Email Send Status w	vill display.	
An email will arrive in the recipients Er	Request: 1040 Documentation Bobby Underwood To # Bobby Underwood	
		Click the link below before 08/30/2019 to submit your files(s): Submit SITEI0:10534 Shelby's Bridge Thrift Shop
To submit files to authorized recipients only, <i>click</i> the <u>Submit</u> link. <i>Enter</i> <b>Your email</b> address in the address field. Click <b>Proceed</b> .	() CONARC	Submit Files Your email: Submit files for authorized recipients Only, Submission options will be shown after you supply your credentials. Proceet
The Submit New Document(s) window displays. <i>Click</i> Browse to <b>upload a document</b> . <i>Click</i> Add File to add additional files. <i>Click</i> Upload to upload all document(s).	Submit New Document(s) File: [C2011 Counct: Spann Registerents/2011 Counct Configurate File:	Decription: R P Energy: Decription: Decri

Once the recipient has uploaded the documents(s), the document(s) will appear in the *Client File Listing area* in the **Submitted Files** section (highlighted yellow).

Submitted Fil	les									*
0 Ø-	Folder	Year	Title	Size	Delete	Created By	Last User	Modified 🖨	Created	
	2	2019 (Optional field)		155 k	<b>X</b> 1		bobby.underwood( 07/31/2019	07/31/2019 11:09 AM	07/31/2019	
Document Coun	d: 1		ra ka Page 1	of 1 👞 🖂 100 🔻						
0 🖂 🖉 🗟					_					
	oe Year Title		Size	Category	Modified	Created By	Created	Links	Parent	-
. • 🖻	2019 FS-Q2-03 13 19		8 k			Imagby	07/24/2019		Audit	
D					11:45 AM					

To accept the document(s), *check* the **checkbox** next to the Document(s). *Hover* over the **Gear icon**, the action list will display. From the list, *select* **Accept**, **Copy to Zip**, **Email**, or **Delete**.

Submitte	d Files	
□ 🌣 -	Accept	Year
	Copy to Zip Email	🔁 2019 (Optional field)
Document	Delete	

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### Document Feature: Assign Tags

**Review** iChannel Document Management Area Overview – iChannel Filter Topic | Subtopic Category section to learn more about Tags.



Document Feature: Merge PDFs iChannel PDF Merge featu PDFs documents that have or passwords set on	e any type of security
Gear Icon – Merge PDFs	
Step Action	
Select a document(s) from the File Listi Gear icon, the action list will displa The Merge PDF Documents window will d	ay. Click Merge PDFs.
Merge PDF Documents           Documents Selected           The following selected FDFs will be merged into the first document. Only PDFs that currently do not have any sort of restriction (like a password etc) can be processed.	Copy Internal Link
2019 Basic User Training Agenda	• In the <b>Documents Selected</b> area, the
	Documents Selected         The following selected PDFs will be merged into the first document. Only PDFs that currently do not have any sort of restriction (like a password etc) can be processed.         Image: 2019 Basic User Training Ac ends         Image: 2019 Basic User Training Ac ends         Image: 2019 Basic User Training Ac ends         Image: 2019 Adva coed User Training         Image: 2019 Adva coed User Training
	documents(s) you selected (source documents) to iles. <i>Click</i> on a document, <i>hold down left-side of your</i> cuments in the order to perform the merge.
merge document will display and the "Merge" will be added to the docu- title. To update the name, if necessary in the title field and update. • Mark source documents to Deleted – if the merged docu (source documents) are no loc to be Deleted. iChannel will	e word ument y, click to be Merge PDF Options: Merge document title 2019 Basic User Training Agenda-Merged Mark source documents to be Deleted Merge with bookmarks
-	if the merged documents (source documents) have the to merge the documents and maintain your bookmarks, <b>s</b> .

# **iCHANNEL**

 To update any properties associated with the merged document, *check* Show
 Properties (Categories, Years, etc.) checkbox.

A new window will open. Update the **Parent, Category, Document Status, Year**, as necessary.

 To merge the documents, click Merge Documents. The Merge PDF Documents confirmation page displays.

**Document Management Table of Contents** 

Change Properties					
Show Properties	s (Categories, Y	ears etc.)			
Parent: Adminis	trative	*	Category:	Correspondence	•
Document Status:	Normal		*		
Year: 2019		*			
Use standard	d file naming				

Merge PDF Documents	
	j⊾ PDI ❤
	Files are merged successfully.

#### Document Feature: Secure PDFs

There are circumstances where document(s) are sensitive and before a user's or client can view or open the document, you want to provide an additional layer of security (encryption).



# iCHANNEL



#### 뇌 Document Feature: Copy Internal Link

There are circumstances where a user would like to share a document(s) in the File Area with another internal user(s), but not all document(s) in your File area. The **Copy Internal Link** feature will let you share out document(s) by making a copy of the document(s) where you can share out the document(s) via a Link. Once you have copied the link, you can paste in an email and share with another user, for an example.

When the user(s) clicks the link, the use(s) will only have access to the File Area where the document(s) reside and will only have access to those document(s) identified in the Copy Internal Link.



#### 뇌 Document Feature: Check-Out | Undo Check-Out | Check-In

- **Check-Out** user(s) need the ability to quickly access document(s) to share with other user(s) or client(s). It's key to working in today's face paced mobile environments.
  - When the document(s) is Checked-Out, the document(s) will be set to read-only.
     User(s) are required to download and save the document(s) locally for offline editing by clicking the link and select "Save" or "Save As".
  - Once finished editing the document(s), use the **Check-In** feature to upload the document(s) back to the **File Area** in iChannel.
  - While the document(s) are checked out, other user(s) can **only view**, but not modify the document(s) in iChannel.
  - On the **Document Check-Out** screen, user(s) can add additional information about the check-out in the **Check-Out Options**.



Check Out Options:	In the Check-out Options section:
Check-Out Options:	• (Optional) <i>Check</i> the <b>Get Zip</b> checkbox if you want to <i>Create a zip file containing</i>
	the checked-put document(s).
	• (Optional) Check Out Information, enter a Return Date, enter a Return Time.
	These field define when the expectation for the document to be check-in.
	<ul> <li>By <i>default</i>, iChannel sets the return date to 1-day; this can be customized</li> </ul>
	to a different number of days. Please contact you System Administrator.
	• (Optional) <b>Comments</b> allow the user to provide additional information about the
	doucment while it's checked-out.
	<ul> <li>All comments are <i>saved</i> in the <b>Document Hist</b>ory</li> </ul>
	• (Optional) <b>Email Notifications</b> are a great tool to nofify other users when working
	in a collobrative environement. Select user(s) email addresses from the list or
	enter email addresses manually (Internal or External email addresses).
	• (Optional) <i>Check</i> the <b>Attach the document to Email</b> checkbox if you would like
	to attach the document(s) to the email.
	• Click check-out the document(s). The 🅙 icon will update to 🚨 to
	indicate the document(s) have been checked-out.
	Check-Out Options:
	Get Zip:
	Return Date:         08/22/2019         II         12:40 PM         O         Default: 1 day
	Comments:
	Add comments about what you will do with the document while it is checked-out. Comments are included in the email notification.
	Email Notifications:           andrew.churilla@conarc.com         bbbby.underwood@conarc.com
	✓ 2/s@conarc.com
	ralph.hardy@conarc.com andrew.churila@conarc.com
	Enter additional email addresses, separated by ',' or ','     Attach the document to Email
	Check Out Cancel
	Balandaria Vernez

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Addition

# ∑ Document Feature: Create Portal Request

The Create Portal Request allows the user to make a request for document(s) via the Portal. To make the request, users will create an Activity (task) show on the portal for their clients to access and upload the requested document(s).

Step	Action
\$ v	Select a document(s) from the File Listing area. Hover over the Gear icon, the action list will display. Click Create Portal Request.
	<image/>
Details	<ul> <li>Name – enter the Name of the Activity (Portal Request).</li> <li>Type – by default, Request will populate in the Type field.</li> <li>(Optional) Class – select, if applicable, a Class type from the drop-down list.</li> <li>Start   End Date – select the Date Icon to enter the start date and end date for t</li> </ul>
ormation	<ul> <li>requested Activity. If the activity is all-day event, <i>select</i> the All Day Event checkbox.</li> <li>Project – if requested document(s) are part of a project, <i>select</i> the Project from the dro down list.</li> <li>Entity – by default, the Entity will pre-populate with the entity name. If you need change the entity, <i>select</i> the Entity drop-down list.</li> <li>(Optional) Priority – this optional field can be: Blank, High, Medium, or Low.</li> </ul>

## **iCHANNEL**

Contacts	Contacts –
	<ul> <li>Highlight a contact from the pre-populated contact list, click</li> </ul>
	• <i>Highlight</i> a contact from the removed selected section, <i>click</i> Remove Selected
	Tool Tip:
	Double-click a Contact to Add a contact Double-click to Remove a contact from the Remove Selected section
Ĵ.	To select multiple Contacts, hold down the Ctrl key and select contacts
	• <b>Requests</b> – in the <b>Documents to attach</b> section, the name of the document(s) to show on the portal (Portal Request) will be listed.
	<ul> <li>To add an additional request, manually enter the item description in the Item field.</li> </ul>
	<ul> <li>(Optional) To add notes on the requested item, manually enter notes in the Notes field.</li> </ul>
	• In the Activity banner, select Show On Portal checkbox. This will ensure the
	document(s) is visible on the Portal.
	• Click Save.
	Document Management Table of Contents
I	

### Document Feature: Assign To

Documents are assigned to an internal user(s). User(s) have two options when working with the **Assign To** feature. A User can permanently assign document(s) to another user or they can temporarily assign document(s) to another user and set an expiration date for the length of time that document or documents are assigned. To re-assign a document(s) to another internal user, select the Assign To feature.



# **iCHANNEL**



Click Save

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#### ڬ Document Feature: Move | Rename | Copy

User(s) have the ability to:

- Move: this feature allows a document to be moved to a new Site, Category (Topic | Subtopic), to name a few.
- Rename: this feature allows the user(s) to rename the document.
- Copy: this feature allows the user(s) to make an internal copy of the document.

d	80	
	<b>÷</b> •	Assign To
	۲	Move
	4	Rename Copy
	۲	Rollover
		Re-Categorize

# iCHANNEL

ep Act	ion	
	<i>lect</i> a <b>document(s)</b> from the File Listing area.	Hove Document(s)
Ho	<i>ver</i> over the <b>Gear</b> 🔯 🗾 icon, the action list	Change Entity (Optional). Click in the base to Phase 1, checked documents are processed as is, any unchecked documents are processed in Phase 2. Change Entity (Optional). Click in the bas to overmite the current entity A start typing an extity rame. Matching results will be listed, choose a new entity. Phase 1: Process Selected Dates: The devide documents are more with the direct ensemblar procession. To raw of ense for 100s. If the Decinedan COV dates
wil	l display. Click Move.	Into these a metaling category, there are automatically underlade. If your need to charge the impactions you could underly the documents, feeline clocking Nove. Phase 2: Process Remaining Dess: Underlade documents will remain listed will properties are ensigned. Check documents, (individually or in groups) to assign the properties related in the Changes Properties section that displays after threads 1, and (LA) News.
	• Entity: <i>click</i> the entity field to search	Repeat until all documents are processed. Lastly: [SRU Lostly: Shu properties (categories, year, tags, etc)
	for a Entity. Enter at least three	Type Title Year Category Status     Year Category Status     Moreal Status
	characters.	Change Properties Select the properties to apply to the documents checked above. Category:
	• Title: if the document name needs to	Converse   Accounting  Change Request  Converse  onverse  Converse  Converse  Converse  Converse  Converse  Converse  Converse  Converse  Converse  Converse  Converse  Converse
	be updated, <i>click</i> the <b>Title</b> field and	Consegurations Graphics Implementation Information
	update.	Siles  Target Subloker:
	<ul> <li>Show properties (categories, year, tag,</li> </ul>	Create new Target Subfolder: (eptional) Public to Portat: Permanent: #
	etc.): check the checkbox to display the	Year: 2019 ▼ ) ® Update year for all files <sup>©</sup> Keep year for each file Use Standard He Kaming: @
	Change Properties. Select the	Decument status: Normal  Decument Taps: Index Netes >
	properties to apply to the documents.	If Process Bios in the background. I understand the flice may not immediately appear in the listing. Lincheck if you prefer to wait until all flice have been processed. [Hence]
	• Publish to Portal: if the document	
		with any changes, check the Publish to Porta
	checkbox.	
	• <b>Permanent:</b> by default, the Permanent cl	
	• Year: if the year needs to be updated, <i>cli</i>	•
		ocument needs to be updated, click the drop
	down list.	
		he document to a Workflow <i>, click</i> the " <b>arrow</b>
	to expand the Tag   Workflow list.	
	Click Move.	
	lect a <b>document(s)</b> from the File Listing area. <i>I</i>	<i>lover</i> over the <b>Gear 🕸 icon,</b> the action lis
Sel	I diambas Click Demonsor	
	l display. Click Rename.	
	Rename Document(s)	
	Rename Document(s) Entity: SRU Entity	
	Rename Document(s)	Year     Category     Status       11     2019     Training     Normal

• **Title**: if the document name needs to be renamed, *click* the **Title** field and enter a new title.

# **iCHANNEL**

Select a **document(s)** from the File Listing area. Hover over the **Gear** icon, the action list will display. Click **Copy**.

- Entity: *click* the entity field to search for a Entity. Enter at least three characters.
- **Title**: if the document name needs to be updated, *click* the **Title** field and update.
- Show properties (categories, year, tag, etc.): check the checkbox to display the Change Properties. Select the properties to apply to the documents.

Documents	ment(s)	in two pha	ses. In Ph	ase 1, chec	ked docume	nts are proce	ssed as is, any u	inchecked d	ocument	s are proc	essed in Pha	ase 2.
Change Ent	ity (Optional).	Click in the l	box to over	write the cu	rrent entity &	start typing an	entity name. Mat	ching results	will be lis	ted, choose	e a new entity	r.
							properties. You n properties you m					
Phase 2: Pr the propertie	ocess Remainin is selected in the	ng Docs: Ur Change Pr	checked do	cuments will action that d	II remain lister Sisplays after P	d until properti Phase 1, and cl	as are assigned. C ick <b>Copy</b> .	heck docume	ints (Indiv	idually or i	n groups) to a	assign
Repeat unti	il all documents	are proce	ssed.									
Entity: SRU	Entity		8	Show prop	perties (catego	ories, year, tag	s, etc)					
Туре			Title			Year	Category	Status				
e 🖻	WELCOME TO I	CHANNEL KR	CKOFF CALL	_20190809_	1611	2019	Training	Normal				
	Accounting	*										
	Change Request Code Programs F Correspondence Graphics Implementation Legal Marketing Sales	orms										
Farget Subf	Code Programs F Correspondence Graphics Implementation Legal Marketing Sales	orms										
arget Subfe	Code Programs F Correspondence Graphics Implementation Legal Marketing Sales <b>older:</b> arget Subfolder:					(optional)						
arget Subfo \ reate new Tr Publish to P	Code Programs F Correspondence Graphics Implementation Legal Marketing Sales older: arget Subfolder: bottal:			•		(optional)						
Farget Subfr \ Create new Tr Publish to P Fermanent:	Code Programs F Correspondence Graphics Implementation Legal Marketing Sales <b>older:</b> arget Subfolder: tortal:			•		] (optional)						
Farget Subfi \ Create new Tr Publish to P termanent: rear:	Code Programs F Correspondence Graphics Implementation Legal Marketing Sales older: Arget Subfolder: Cortat: Cortat: 2019 •			•		_ (optional)						
arget Subfo 	Code Programs F Correspondence Sraphics Sraphics Implementation Lepal Marketing Sales <b>older:</b> arget Subfolder: <b>ortal:</b> 2019 <b>•</b> File Naming:					(optional)						
farget Subfo	Code Programs F Correspondence Sraphics Implementation Legal Marketing Sales <b>older:</b> arget Subfolder: tortal: 2019 • File Naming: File Naming: gs:	2		•		(optional)						
Farget Subfa	Code Programs P Correspondence Graphics Implementation Legal Marketing Sales older: arget Subfolder: ortal: 2019 ▼ 2019 ▼ File Naming: stus: gs:	Normal Release	Opportunity	• /***			listing, Uncheck I	f you prefer t	o wait uni	il all files h	save been	

- **Publish to Portal**: if the document needs to be published to the client portal with any changes, *check* the **Publish to Portal checkbox**.
- **Permanent:** by default, the Permanent checkbox is checked.
- Year: if the year needs to be updated, *click* the drop-down list.
- Document Status: if the status of the document needs to be updated, *click* the dropdown list.
- Document Tag: to add a Tag or to assign the document to a Workflow, *click* the "arrow" to expand the Tag | Workflow list.
- Click Copy.

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### Document Feature: Rollover

User(s) could have a document(s) where those document(s) will be used year-over-year with a client. The Rollover features allows the user to rollover (copy) a document(s) to another year. The document will be an exact copy of the original document(s) that is being rolled over.



# **iCHANNEL**

- Entity: *click* the entity field to search for a Entity. Enter at least three characters.
- **Title**: if the document name needs to be updated, *click* the **Title** field and update.
- **Rollover to Year**: *click* drop-down list and select a new year.
- Click Rollover.



**Document Management Table of Contents** 

### ڬ Document Feature: Re-Categorize

The **Re-Categorize** features allows for a document(s) to be assigned to new Categories (Topic | Subtopic) in iChannel.



### ڬ Document Feature: Publish and Link

The **Publish and Link** feature allows for a document(s) to be published to the iChannel Portal for client(s) to access and additional will link that document(s) to another Site for access.

Clients (Portal Users) only have access to the document(s) you publish to the iChannel Portal from their respective File Area. Security Group Permission control what can been viewed on the Portal.

2019 Worknamers

#### Gear Icon – How to Publish and Link Step Action Select a document(s) from the File Listing Area. Hover over the \$ v Gear **Gear icon**, the action list will display. *Click* **Publish and** Publish and Link Link. Publish only Link only Unpublish / Unlink The Publish and Link window will display. Publish and Link (The Publish/Link Title Expiration Date (optional) (9) Expiration Date (Optional) – WELCOME TO ICHANNEL KICKOFF CALL\_20190809\_1611 09/23/2020 this optional field allows you to Notification: Send Extranet Notification Now File Area Search set an expiration date. This Begins with Entity Name date determines how long the Login Site Name/Client ID: Site Code Published document is Current Site Custom Fields Sort By available on the Portal. Sotification: - to send a notification to the Portal, check the checkbox Send Extranet Notification Now. File Area Search – next, in the File Ares Search fields, search for the Site to which the document(s) should be linked to. Click Search Search Results: in the Portal Topic/Subtopic list, select all Topic/Subtopics that apply. If the information on the Publish and Link page is correct, select Publish/Link The Document(s) have been published/linked. message will display. Published | Linked Document(s) – Icon 🔄 After a document(s) has been Published and Linked, in the File Area a new icon 🝺 $ec{z}$ will appear for published | linked document(s). Туре Creat 2019 2019 BASIC USER TRAINING AGENDA\_20190826\_1251 ₽i 195 k Correspondence 09/24/2019 bobby.underwood 08/26/2019 2:10 PM Administrative

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Audit

08/11/2019

09/13/2019 Imagby 11:42 AM

118 k Worknapers

*i***CHANNEL** 

#### 뇌 Document Feature: Publish Only

The **Publish Only** features allows for a document(s) to published to the iChannel Portal for client(s) to access.



## Document Feature: Link Only

The Link Only features allows for a document(s) to be linked to another Site for access.

Gear	lcon –	How to Publish and Link	
Step	Action		
\$ ·		a <b>document(s)</b> from the <b>File Listing Are</b> <b>ar ar icon</b> , the action list will display.	Click Link Only.
	The <b>Pul</b>	blish and Link window will display.	Publish and Link (The following document records will be Linke)    Link Cancel
	9 9 9	Ares Search fields, <i>search</i> for the <b>Site</b> to which the document(s) should be linked to.	Title         How to Email a Client a File or Files from iChannel Secure Email         File Area Search         Begins with         Company Name:         u         Company Name:         Urrent Site Custom Fields:         Oursen's         Sort Dr:         Sort Dr:         Sort Dr:         Sort Dr:         Sort Results         Login Site Name/Client ID         Company Name         Site Code:         Urrent Site Custom Fields:         Sort Dr:         Sort Dr:         Sort Dr:         Sort Dr:         South         How South         South         South         South         South         South         South         South         South         South
	The	ned   Linked Document(s) – Icon After a document(s) has been Linked, i linked document(s).	e will display. In the <b>File Area</b> a new icon <i>i</i> will appear for

đ	1 🖂 🖗	3 💊 👘									
	¢ •	Туре	Year	Title	Size	Category	Modified 🖨	Created By	Created	Links	Parent
	۲		2019	How to Email a Client a File or Files from iChannel Secure Email	79.28 m	Correspondence	09/24/2019 2:33 PM	bobby.underwood	08/02/2019	Ż	Administrative
	۲	1	2019	2019 BASIC USER TRAINING AGENDA_20190826_1251	195 k	Correspondence	09/24/2019 2:10 PM	bobby.underwood	08/26/2019	PŹ	Administrative
	۲	Þ	2019	Workpapers	118 k	Workpapers	09/13/2019 11:42 AM	Imagby	08/11/2019	•	Audit

#### Document Feature: Unpublish / Unlink Document(s)



# **iCHANNEL**



#### Document Feature: Copy to Folder (Append) | Copy to Folder (Replace)



# **iCHANNEL**



# **iCHANNEL**

# **Document Feature: Delete**

Gear	lcon – How to Delete Document(s)		
Step	Action		
\$	Select a document(s) from the Entity File Area. H	<i>over</i> ove	r the
	Gear icon, the action list will display. <i>Click</i> I	Delete.	Mark For Deletion
	The These files will be deleted window will disp	lay.	
	Click Delete Document.		These files will be deleted
	Click OK.		TEST EXCEL_20190212_1059 (DOC10025593) Cancel Delete documents
		ichannel.co Are you sure	
	The <b>Results</b> window will display.		OK Cancel
	Click Close.	Results	
		Test Word Document:	Marked
	Document Management Table of Contents	Close	

#### Module 4: iChannel CRM

iChannel **CRM (Contact Relationship Manager)** tool provides your Organization with a central contact management database allowing users to efficiently manage client relationships, vendors, employees and interactions users have with their clients.

Debail Contact <sup>2</sup> Locassin <sup>2</sup> Actively <sup>8</sup> Netification Prore 1: 404-723-4201 est.   Primery Address: 200 Dornarde Prore 1: 404-723-4201 est. est.   Data The 2008 Prore 1: 404-723-4201 est. est.   Data The 2008 Prore 2: est. est.   Control Made State Prore 2: est. est.   Data The 2008 Prore 2: est. est.   Coston Cleart Fields Prore 1: Prore 2: est.   Prore 1: Prore 2: est. est.   Coston Cleart Fields Prore 2: est. est.   Prore 1: Prore 2: Prore 2: est.   Prore 2: Prore 2: Prore 2: est.   Prore 1: <th>Detail: 5R</th> <th></th> <th>Pipeline X ☆☆☆</th> <th></th> <th>Routing New Rou</th> <th>ting System</th> <th></th> <th></th>	Detail: 5R		Pipeline X ☆☆☆		Routing New Rou	ting System		
many Address 2     Bol Bornavale Drive     Address 2     Poor 2:     Address 2     Poor 2:     etc.     Address 2     Poor 2:     etc.     Address 2     Poor 2:     etc.     Address 3     Poor 2:     etc.     Address 4     Poor 2:     etc.     etc.     Address 4     Poor 2:     etc.     e					ion Droject 1	lichony		
Addrews 2 Proce 2: ext.:   Addrews 3 TX. 75203 Pre.1:   Units: TX. 75203 Pre.2:   ext:: Web Site:   Web Site: Web Site:   Web Site: Web Site:   Addresses & Phone Numbers Image: Called Entitie:   Called Entitie: Image: Called Entitie:   Outpry: Controlling:   (Image: Called Entitie: Image: Called Entitie:   Image: Called Entitie: Image: Called Entitie:	· · · · · ·		Activity	Houncar	-		ert	1
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rent Enthy: letonchip: leton	ountry:		75200					
detrontije:     Addresses & Phone Numbers     <			Ass	ian		<b>T</b>		
Linked Entities Add Link					Mail Merge	Delete Entity		
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atus: Aperovad V setus: Aperovad V setus: SRU.001 recode: 101049 Revenue Estimates: Custom Client Fields Services: Pre-Qualification Software Environment Needs iChannel CRM Extranet Projects Pipeline Mobile Custom HTML Practice Links Engagement Links XCM Links FirmFlow Links SharePoint Links Other Elakes Rox Hosted Other Environment Needs iChannel Carl Extranet Projects Pipeline Mobile Custom HTML Practice Links Engagement Links XCM Links FirmFlow Links SharePoint Links Other Elakes Rox Hosted Other Elakes Rox Hosted Custom HTML Practice Links Engagement Links ACM Links FirmFlow Links SharePoint Links Other Elakes Custom HTML Practice Links Engagement Links Other Links Pipeline Mobile Custom HTML Practice Links Engagement Links Other Links Pipeline Mobile Custom HTML Practice Links Engagement Links Other Links Pipeline Mobile Custom HTML Practice Links Engagement Links Concernet ABBYY 	dustry: C	onsulting V	• •					
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Sanice:       Pre-Qualification         Cichannel Components:       Index FirmFlow Links         Cichannel       CRIM         Cottor Links       Ingagement Links         Other Services:       Index								
Services       Pre-Qualification       Schware Environment       Needs         iChannel       CRM       Extranet       Projects       Pipeline       Mobile         iChannel       CRM       Extranet       Projects       Pipeline       Mobile         iChannel       CRM       Extranet       Projects       Pipeline       Mobile         Custom HTML       Practice Links       Engagement Links       XCM Links       FirmFlow Links       SharePoint Links         Other Links       Black Box       Hosted       -       -       -         JobCenter       WebAppraise       DealChannel       LesseChannel       ABBYY       -         -       -       -       -       -       -       -         JobCenter       WebAppraise       DealChannel       LesseChannel       ABBYY       -         -       -       -       -       -       -       -         -       -       -       -       -       -       -       -         -       -       -       -       -       +       -       -       -         -       -       -       -       -       +       -       -       -	Re	venue Estimates:						
i Channel       C CRM       Extranet       Projects       Pipeline       Mobile         Cutore Links       Engagement Links       XCM Links       FirmFlow Links       SharePoint Links       SharePoint Links         Other Services:								
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	Services Pre- iChannel Com iChannel Custom HTM Other Links - - - - - - - - - - - - - - - - - - -	Qualification Software Environ ponents: CRM I CRM I Black Box I WebAppraise I none	Extranet Engageme Hosted	ent Links XCM nel Leas Scanner Client = Assigned to Service Converted from	Links FirmFlow eChannel ABBYY	Links SharePoint Lir	ks	
Kternal ID Modified: bobby.underwood - 09/30/2019 01:29 PM Created: bobby.underwood - 06/06/2019 02:53 PM	Services Pre- iChannel Com Cuthennel Com Cuther Links Other Service JobCenter Real Estate: 	Qualification Software Environ ponents: CRM I CRM I Black Box I WebAppraise I none	Extranet Engageme Hosted	ent Links XCM nel Leas Scanner Client = Assigned to Service Converted from Extranet Link	Links FirmFlow eChannel ABBYY	Links SharePoint Lir	ks	

#### **Module Overview**

The follow exercise will introduce the building blocks and tools of the iChannel CRM.



In this module, **CRM**, the following topics will be reviewed in detail:

- Contact Search Screen
- How to Search a Contact or Entity
- Add a Site (CRM Only)
- Add a Site (CRM & Document Management Area)
- Site Detail Screen Overview
  - Contacts Tab: Add a Contact | Duplicate Contact
  - Discussion Tab
  - $\circ$  Activity Tab
  - $\circ$  Notification Tab
  - Project Tab
  - o History Tab
- How to Create a Contact
- How to Identify and Resolve a Duplicate Contact
- How to Link a Contact
- How to Update a Contact
- How to Add a Group Group/List

#### **Contact Search Screen**

From the iChannel Dashboard Banner, select Contacts link to open the Contact Search Screen. From this screen, users have the ability to perform complex searches on your contacts or sites.



## 😒 CRM: Contact Search Screen

CRM – How to Search for a Contact   Entity		
Step	Action	
1	<ul> <li>Contact Info</li> <li>Search for a contact by Last   First   City   State or ZIP</li> <li>Click the Search button to return results.</li> </ul>	
2	<ul> <li>Other Contact Search Fields (UDF – User Defined Fields)</li> <li>These fields are unique to your organization and are optional.</li> <li>An organization can have up to 15 UDF fields.</li> <li>Contact your System IT Administrator if you need to have customized UDF fields.</li> </ul>	
3	<ul> <li>Search Result Options</li> <li>Expanded – Displays the address information in the search results.</li> <li>Inactive – Includes inactive contacts in the search results.</li> </ul>	

# Module 4: iChannel CRM

	Linked Contacts – Includes any linked contacts in the search results when performing an Entity search.
4	<b>My Personal List</b> – Allows each user to create a custom list of contacts. The Outlook list is used to Sync with Microsoft Outlook.
	Show Members Of – this drop-down list to display the contacts that are in the selected group.
	Display Columns – allows you to choose the columns you would like displayed in the search results quickly add/remove contracts from the selected list.
5	Global Groups   Lists - these search settings correspond to the groups in the Group   List
5	section list.
	Show Members of drop-down list – display the contacts that are in the selected group(s).
	Display column – allows users to choose the columns you would like displayed in the search results to quickly add/remove contacts from the selected list.
6	Save Search Criteria
0	Click the Save Criteria button at the bottom of the screen to save the search fields o the screen. This is helpful if you will being search for the same fields over and over.
	Click the Clear Criteria button to clear any saved search criteria.
7	More drop-down list – your System IT Administrator will determine if the user has access t
	any of the items in the list.
	Export to Excel
	Some state in the second s
	Add Entity     Add Entity     Add Entity
	<ul> <li>Add Contact</li> <li>Advanced Query</li> </ul>
	Entity Info
8	Search for a Site by Name   DBA   ID   Type   City   State   ZIP   Industry   Active
	<ul> <li>Section for a site by Name   DBA   ID   Type   City   State   ZiF   industry   Active</li> <li>Click the Search button to return results.</li> </ul>
9	Other Entity Search Fields
	These fields are unique to your organization and are optional.

# CRM: How to Search for a Contact

CRM	CRM – How to Search for a Contact	
Step	Action	
1	In the Contact Info, Other Contact Search Fields, Search Results Options, My Personal List, Global Groups   List fields, enter as much or as little information to perform the contact search. <i>Click</i> the <b>Search</b> button to return results.	
	The <b>Contact Search Result</b> window will display.	
# iCHANNEL



- Search for Contact | Site: *enter information* in the Last | First | Entity fields to search for a contact | site.
- **Email** check the email box to send an email to an Internal User or add Internal notes in the available field.
- Completed by selecting the Completed checkbox, the current date | time will automatically populate.
- Click Save Save & Add.

## CRM: How to Search for a Site

Action				
In the	Name, DBA,			option. ctive fields, enter as much or as l
Tho En	tity Soarch P	Click the Second Sec	earch button to returr	n results.
	rch Results			
Files Na		Type/ID/Industry	Custom Fields	Contact List 4 🕑 🗄 Show Proje
390	J Entity 2 Bonnavale Drive	SRU.001	Client Code: none TIME ZONE: cst	Paula Underwood Add Com
Dal	as, TX 75208 404-733-0301	Consulting	Client #: 0 Assigned to: Underwood	Bobby Underwood
1 Records	404-755-0501			Email Selected Contacts ) (Create Activi
2. 3. 4.	Site Name – a Contact Nam info page. Show Project	click the site link t $\mathbf{e} - click$ the contained $\mathbf{s} - click$ the $\mathbf{E}^{\text{Sho}}$	o access the site details act name link for the cor w Projects to show any w	page. ntact to navigate to the Contact Det orkflows associated to the site.
2. 3. 4. 5. 6.	Site Name – a Contact Nam info page. Show Project Add Contact – Email Selecte select Email S	click the site link t e - click the conta s - click the $Sho- click$ the Add Co cd Contacts - select Gelected Contacts	w Projects to show any w mtact to add another co ct the contacts (checkbo button.	ntact to navigate to the Contact Deta orkflows associated to the site. ntact to the site. ox) you would like to start an email,
2. 3. 4. 5. 6.	Site Name – a Contact Nam info page. Show Project Add Contact Email Selecte select Email S Calendar Acti	click the site link t e - click the conta $s - click$ the $\blacksquare sho$ - click the Add Co ed Contacts - selected Gelected Contacts ivity - click the Creation	to access the site details act name link for the con w Projects to show any w ontact to add another co ct the contacts (checkbo button. eate Activity button. Th	page. ntact to navigate to the Contact Deta orkflows associated to the site. ntact to the site.
2. 3. 4. 5. 6.	Site Name – a Contact Nam info page. Show Project Add Contact Email Selecte select Email S Calendar Acti	click the site link t e – click the contacts s – click the Add Co ed Contacts – select selected Contacts ivity – click the Cru using the fields to Activity: The fields to act	o access the site details act name link for the cor w Projects to show any w ontact to add another co ct the contacts (checkbo button. eate Activity button. Th create the Activity type	page. Intact to navigate to the Contact Deta orkflows associated to the site. Intact to the site. (x) you would like to start an email, ne Activity page will display. Fill out

<ul> <li>Iype – by default, Meeting will populate in the Type field. Use the drop-down list to change th type.</li> </ul>
• (Optional) Classify – <i>select</i> , if applicable, a Class type from the drop-down list.
• Start   End Date – <i>select</i> the Date Icon to enter the start date and end date for the requested Activity. If the activity is an all-day type, <i>select</i> All Day Event checkbox.
• Workflow (Project) – if the activity is associated with a workflow, use the drop-down list to search for Workflow.
• <b>Priority</b> – use the drop-down list to select the priority for the activity.
<ul> <li>Notes – enter any additional notes related to the Activity.</li> </ul>
Available Contacts – Assigned Contacts and Entity
<ul> <li>From the Available Contacts list select a contact(s) to add to the Assigned Contacts and Entity.</li> </ul>
<ul> <li>TIP: You can <i>double-click</i> a <b>contact</b> to move contacts between the Available and Assigned windows.</li> </ul>
• Search for Contact   Site: <i>enter information</i> in the Last   First   Entity fields to search for a contact   site.
• <b>Email</b> – check the email box to send an email to an Internal User or add Internal notes in the available field.
• <b>Completed</b> – by <i>selecting</i> the <b>Completed checkbox</b> , the current date   time will automatically populate.
• Click Save & Add.

## CRM: How to Create a Site (CRM Only)

Use the **How to Create a Site (CRM Only)** when you have a new prospect or lead; yet you do not have a need to create a Document Management Area. If your prospect or lead, develops into a Site where you'll need a Document Management Area, you'll need to work with your System IT Administrator to *create* a **SITE** record for the client.



It is not uncommon that your System IT Administrator will create all Entities via an iChannel Interface; therefore, the How to Create a Site (CRM Only) is an optional feature one how to create manually.

Before adding a new Site, it is recommended that you search for the client name to prevent creating a duplicate site. In addition, your organization might select to import Site's through an interface. Please contact your System IT Administrator before creating a new site.

CRM	- How to Create a Site (CRM Only)
Step	Action
1	Select Contacts from the banner. Select the More drop-down button. Select Add Entity.

# **iCHANNEL**

#### Module 4: iChannel CRM

	Files Contacts Projects Pipeline Calendar Routing New Routing System CALANNEL
	Show up to: 100 V O Contact C Entity (Search)
	Contact Info Contact Info Entity Info Exert To Excel
	Last Name: DBA: DBA:
	City: ID: Add Entity
	State: Type: Add Contact
	Zip: City: Advanced Query Other Contact Search Fields: State:
	Other Contact Search Fields:
The Si	te <b>Name</b> window will display.
	Files Contacts Projects Pipeline Calendar Routing New Routing System
1.	Entity Information - Fill in as much
	information as necessary about the
	new entity.
2	Parent Entity – if the new Entity is
۷.	
	part of a Parent Entity, click the Indefense & Phone Numbers
	search field and enter at least three-
	minimum characters to search for an
	entity. (Parent Entity is not required
	to create a new Entity site).
-	
3.	Industry   Type   Status   Active –
	populate as necessary.
4.	Click Save
4.	Critick Channel CRM Critick Projects Pipeline Multi Coutor MTIL Practice tables Compagement table SUCH tables PrimitPow Tables State
	Other Links DBlack Box Hosted
	Other Services:
	☐ JobCenter ☐ WebAppraise ☐ DealChannel ☐ ABBYY Real Estate:
	Referred By Scanner Sammer
	Industry(old) Client # Client Code Assigned to

#### CRM: How to Create a Site (CRM & Document Management Area)

A second type of **Entity (Site)** is an Entity that also has a **Document Management Area**. Where users will manage their clients document(s), share document(s) or request document(s). To create an Entity that has a Document Management Area, the new Entity (Site) will be create from the **System > Sites** feature.

To create an Entity (Site) with a Document Management Area the new site will be created based off a "Template". The Template hold all the File Area structure (categories | topics | subtopics, security, etc.) to name a few.



**"Templates"** are defined by each Organization to create the Document Management Area. Your System IT Administrator in conjunction with your iChannel Implementation representative will define all "templates". Before adding a new Site, it is recommended that you search for the client name to prevent creating a duplicate site. In addition, your organization might select to import Site's through an interface. Please contact your System IT Administrator before creating a new site.

A	tion
	elect System from the banner. Select Sites. The
S	rstem >>Sites page ill display.
	Sites Search Criteria
B	fore adding a new Site it is recommended that
	u search for the client name to prevent Stecore Stecor
С	eating a duplicate site. In addition, your
	ganization might select to import Site's through
	interface. Please contact your System IT
Α	Iministrator before creating a new site.
т	create a new Site:
I	1. <i>Click</i> <b>New Site</b> . The <b>System &gt;&gt; Site Details</b> page will display.
	System + Site Cetalis (Res)
	Include: & Channels/Topics: & Security Groups/Unin in subscribers from parent level
	Detry Numes (*       Doc: Path:     \//PODPSOLconart.com/pitThetry\       Instance topic vulid toelt:     / / / III Theme:
	Add as a CPM Entity record for Intra/Estranet sites.
	Prome 22 end.
	Chri Stathi: Zir wub Site
	Industry: Notes: Type:: Status: Approved
	Active: "Hes • ID+*
	Subcolliers * Show Inacting #
	Site Cole Subsriblers UserID Last Lopin Admin Active Inative Subsriblers Joined Internal Subscribers
_	
	oose a <b>Template</b> from the drop-down list. The list
	splayed is defined by your System IT Administrator. If
	new template is needed, please contact your
	Iministrator.
	<ul> <li>Channels/Topics</li> <li>Security Group/Join in subscribers from parent level.</li> </ul>

# Module 4: iChannel CRM

4	1. Login Site Name: enter a description name for the new Entity; click enter.
	2. Entity Name: field will auto-populate with the Login Site Name (you can update this field,
	but it's not necessary).
	3. <b>Site Type</b> : choose a type from the drop-down list. If the new Entity requires a file area,
	select the File Area from the list.
	Login Site Name: 1 High Grove CPA Site Type:
	Entity Name: * High Grove CPA 3 File Area
	Doc. Path: (\\PRODFS01.CONARC.COM\CLINTRA\H\HIGH GROVE C Subscriber Site
	Extranet Login Valid Until: / /
	<b>The Doc. Path:</b> this field will auto-populate with the document path for where the new entity
5	file area document(s) will be stored.
	<ul> <li>It's recommended to not update this field without consulting your System IT</li> </ul>
	Administrator.
6	<b>Extranet Login Valid Until:</b> enter a date if you want the portal to automatically expire. This is
6	valuable for prospects otherwise ILeave this field "blank".
	Theme: (optional) users can select a theme for the entity.
	Banner Image: (optional) users can select a banner theme for the entity.
7	Add as a CRM Entity record for Intra/Extranet (Portal) site – leave the checkbox checked as
	this will save you the steps fore creating a separate client CRM profile and then linking it to the
	clients Site profile.
	Address   City   State   ZIP   Phone   Website   Country – add as much information about
	the new Entity as possible.
	Add as a CRM Entity record for Intra/Extranet sites.         Address:       Phone 1:         ext.
	Phone 2: ext.
	City:  State:    Zip:  Web Site:
	Country:
	<b>Industry</b> – choose from the drop-down list the industry that best identifies the new entity.
8	<b>Type</b> - choose from the drop-down list the type that best identifites the new entity.
	<b>Status</b> – choose from the drop-down list the status that best identifies the new entity.
	Active - if the new entity is Active, select Yes. When an Entity is no longer active, select No.
	ID – the ID field is required and is usually the unique identifer for the Entity. Consult with your
	System IT Administrator to determine the ID.
	Notes – (optional) enter additional notes as necessary.
	Industry: T Notes:
	Туре:
	Status:     Approved       Active:     Yes
	ID:*
	Click Save.

The new Entity (Site) will be created and the System >> Site Details page will display. 9 A few highlights: 1. Quick Links: a. Docs - click this button to access the Document Management Area b. Emails - to generate an email from this page, click the Email button c. Save – to save any updates to the Site Details, click the save button d. Add – to add a new Entity (Site), click the add button e. Delete - to permantely delete the Entity (Site), click the delete button Site Code will be auto-genarated. 3. Site Code (internal site identifer) will be auto-genarated. 4. (Directory is valid) will display indicatating that the Doc. Path is active. 5. Subscribers – in this section, two (2) Subscirbers will be created. a. ADMINSTRATOR USER & DEFAULT USER 6. Entity Detail (link) – click this link to access the Entity Detail Screen (CRM). Add Contact button – once an Entity (Site) has been created, if there are contacts associated with the new Entity; you can add contacts from this screen. 1 Docs Emails Save Add Del System » Site Details mplate: TEMPLATE\_TRAINING AND SERVICES V OR Site Code: 00143 2 Re-Copy Template Re-Copy Template Settings Training and Services Site Type: File Area Site Code: 00225 (internal site identifier Entity: Training and Services Add Contact tity Name raining and Services \\PRODFS01.0 Directory is v Theme: (Upload Images) Advanced Setting) 0/2010 10-55 AM od Cre Last Lo ADMINISTRATOR USER ADMIN 🏟 01/01/1900 12:00 AM 0225 DEFAULT USER 01/01/1900 12:00 AM Training and Services ined Internal Sub roups For Site Training and Se

# S CRM: Entity Detail Screen Overview

The Entity Detail Screen provides a quick overview of your entire organization's relationship with the selected entity. Information is organized into tabs for easy access.

- Detail
- Contact
- Discussion Activity
- Notification
- Projects
- History

	Detail.		Projects			-		More V (Save) (Docs) (Site) (Add Co
Trainin	g Detail: Training	and Services dba:		*****				More * (Save) (Docs) (Site) (Add Co
Detail	Contact <sup>2</sup> Disc	ussion Activity	Notificatio	n Projects History				
rimary Address	Address 1			Phone 1:		ext.		
	Address 2			Phone 2:		ext.		(
	Address 3			Fax 1:				
		, State Zip		Fax 2:				To access the
untry:				Web Site:				
ent Entity:		Assig		Communication:	•			Client Detail screen:
				Mail Merge Del	lete Entity			
ddresses & I	Phone Numbers						×	
<b>inked Entitie</b> dustry:	Phone Numbers es (Add Link) Training	• 9						Locate an entity (site anywhere in iChanne
iddresses & I inked Entitie dustry: pe:	Phone Numbers es (Add Link) Training Training	•					×	
ddresses & I inked Entitie dustry: je: itus:	Phone Numbers es (Add Link) Training Training Approved						×	anywhere in iChanne and <i>click</i> on the
uddresses & I Inked Entitie dustry:	Phone Numbers es (Add Link) Training Training	•					×	anywhere in iChanne
ddresses & I inked Entitie dustry: pe: atus: tive: ;*	Phone Numbers es (Add Link) Training Training Approved Yes	•					×	anywhere in iChanne and <i>click</i> on the
ddresses & i inked Entitie dustry: pe: stus: tive: s ecode:	Phone Numbers es (Add Link) Training Training Approved Yes TS00143	•					×	anywhere in iChanne and <i>click</i> on the <b>Entity (Site) link</b> .
ddresses & l nked Entitie ustry: e: tus: ive: * ecode:	Phone Numbers es Add Link Training Training Approved Yvei TS00143 225	•					×	anywhere in iChanne and <i>click</i> on the
ddresses & l nked Entitie ustry: e: tus: lve: * ecode:	Phone Numbers es Add Link Training Training Approved Yvei TS00143 225	•					×	anywhere in iChanne and <i>click</i> on the <b>Entity (Site) link</b> .
ddresses & l nked Entitie ustry: e: tus: lve: * ecode:	Phone Numbers es Add Link Training Training Approved Yvei TS00143 225	•					×	anywhere in iChanne and <i>click</i> on the <b>Entity (Site) link</b> .

**Entity Type** – the type of Entity (Client, Prospect, Vendor, etc.) will display before the Entity name. **Entity Name** – the display name of the entity that is used for all searches in iChannel. This field will autoresize to fit the contents.

**DBA** – "Doing Business As name". If there is a defined DBA name; the user can perform a "search" using the DBA name.

My Entity Stars – allows users to setup My Entities on their Dashboard to quickly locate and access most often used entities (sites).

Action Buttons are based on your organization's security settings. You may not have access to all or any of these action buttons. Please contact your System IT Administrator if you feel you need access.

- S More click the drop-down arrow to access Emails, Add Entity or Activity Report by Entity
- **Save** saves any updates or modification made to the detail page.
- **Docs** navigates the user to the Document Management Area for that client.
- Site navigates the user to the Site Details for the entity.
- S Add Contact click and you'll be navigated to the Add Contact to add a contact to this entity.

### ڬ CRM: Detail Tab

CRM	I – Detail Tab
Step	Action
	By <i>default</i> , the <b>Detail tab</b> will display. The Detail page is broken down into three main sections:
	Client Address Information, Linked Entities, and Custom Client Fields.

	Detail:       SU Entey       doc       X * * * * *         Datail       Context 3       Discussion 6       Activity 3       Notification       Project 3       History         Primery Address       300 Bonorwale Drive       Primer 1       404-732-0201       ext.       ext.         Address 3       Primer 1       404-732-0201       ext.       ext.       ext.       ext.         Address 3       Primer 2       Primer 2       ext.       e
	Service:       Image: Content History         Biology
1	Sector Detail Tab: Client Address information Sector Tab:
2	<ul> <li>CRM – Detail Tab: Linked Entities</li> <li>If the new entity (site) being created is also Linked to another entity (site), click the Add Link button.</li> <li>The Link Entity to {Current Entity} window display.</li> <li>Select the entity(s) to link your {current entity} to.</li> <li>Click Save or Save and Add More.</li> </ul>
3	<ul> <li>CRM – Detail Tab: Custom Client Fields</li> <li>These fields are optional, and your Organization will determine the number of custom client fields to support your entity. Each Organization can have up to 150 custom fields.</li> </ul>

# CRM: Contact Tab

CRM	– Contact Tab
Step	Action
1	The <b>Contact tab</b> will display the total number of contacts associated with this entity (site). The
<u> </u>	<b>Contact</b> <sup>3</sup> tab will display a <b>red number</b> , indicating the total number of contacts associated
	with this entity (site). <b>NOTE:</b> All contact entries are also defined as links for quick and easy
	access to the contact record.
	Detail         Contact <sup>3</sup> Discussion <sup>6</sup> Activity <sup>5</sup> Notification         Project <sup>1</sup> History           Contacts (1)
	Underwood, Paula 404-733-0301 Paula.underwood@email.com
	Linked (1) 2 Portal Name Phone Email Company/Title (Classify/Dect. Role/Designate Last.Login Unlink
	Portal         Name         Phone         Email         Company/Title (Classify)/Dept         Role/Designate         Last Login         Unlink           Doe, Jane         716-712-3456 (w)         jdoe@noemail.com         Acree Northeast Painting         ¥
	Internal Assigned (2) 3 (Add Internal)
	Portal         Name         Phone         Email         Title/Dept         Role/Designate         Notify/Favorite         Last Login         Unlink           Underwood, Bobby         770-849-0508         bobby.underwood@conar.com VP Training and Services         Services         Yes         10/15/2019         ¥
	Kirkham, Greg     770-849-0508     greg.kirkham@conarc.com     Implementation Lead     No     No       Implementation     No     No     No     No
	The Contact page is divided into three main grade
	The <b>Contact</b> page is divided into <i>three main areas</i> : <b>Contact</b> – all contacts that are associated with the Entity (site). Typically, the external
	Contact – all contacts that are associated with the Entity (site). Typically, the externa contacts for the entity (site).
	<ul> <li>Delete All – <i>click</i> this button to delete all contacts. NOTE: please contact you System IT Administrator before deleting any contact records.</li> </ul>
	<ul> <li>Import from Excel – click this button to export out a list of all contacts associated</li> </ul>
	with this entity (site).
	Linked – this area will display any contacts, vendors, service provides, etc. that area
	<i>"linked"</i> into this entity. These linked contacts are in some ways associated with the
	main entity (site). To be linked, the contacts must have a primary entity contact record
	first.
	• Add/Edit – <i>click</i> this button to add another contact (Linked) to the entity (site)
	You can also edit any contact that is already linked.
	Internal Assigned – these contacts are the internal users (employees) of you
	organization that are associated with this entity (site, client).
	<ul> <li>My Entity Stars – allows users to setup My Contacts on their Dashboard to quickl</li> </ul>
	and easily access often used entities (sites).
	Key visual indicators:
	<ul> <li>Active globe with a Yellow Plus Sign = Contact with Administrator privileges.</li> </ul>
	<ul> <li>Active globe indicates has access to iChannel Portal.</li> </ul>
	<ul> <li>an Inactive globe indicates the contact does not have access iChannel Portal.</li> </ul>

• 🚖 🚖 = Primary Contact for the Entity (Site).

- Secondary Contact for the Entity (Site).
- If the Contact is Active and created to access the iChannel Portal, the green arrow will provide a quick access to the iChannel Portal from iChannel. Great for testing to ensure you have set up the Channel Portal for the user.

#### CRM: How to Create a Contact





# S CRM: How to Identify and Resolve a Duplicate Contact

Step	s for How to Identify and Resolve a Duplicate Contact
Step	Action
1	When adding a new contact, iChannel validates the new contact information with the following data:
	Email address
	I First Name
	S Last Name
	If any of these three triggers another match(es) already in iChannel, you will receive a message stating "Contact is duplicated". As a user, you have three options on how to handle the duplicate entry.

# Module 4: iChannel CRM

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	* Tele/	May & Bindge Thurth Shop (SB-0001) Description Context Type 3 User Client Detail: Skelby's Bodge Thoth Shop Am. 24 detail Context 4 Activity 33 Notificati statics (9) Add Context 4 Add Context Context 5 Add	s) Status s) Filter, ListA 余余余余☆☆	Drag documents here to upload or     Email      Trite (Classify) Organization     francing memail.com     Tit Services Inc.     francing memail.com     Totaria	Role Designate #Secondary
		iP         Carpenter, John           iP         Elia, Tm           iP         Manuschart, John	555-555-4478 555-555-4478 Contact is duplicated \$ 555-555-4478 555-555-4478 555-555-5478	JohnBegahlepichanel.com         Lewer           Tim@schematic.com         Busines Marger           donadgebichanel.com         Secretary           gregBemäl.com         Fandgmal.com           Pandgmal.com         Secretary           shelty-dischemel.com         Secretary           Shannen@sbichannel.com         Office Manager	
<i>Click</i> t		<b>t is duplicated.</b> The I	Duplicate Conta	act Management	window will open.
	Duplicate Contact Manage	Greg Kirkham (IChannel Demo Site)		Greg Kirkham (Shelby's Bridge Thrift Shop)	Merce
	ContactDetails First Name	Greg	C Link to Master Ignore Delete	Greg	C Link to Master Ignore Delete
	Last Name E-Mail Address line 1	Kirkham     greg.kirkham@conarc.com		Kirkham     greg@email.com     103 Main Street	
	Address line 2 Address line 3				
	City State Zip			<ul> <li>Sudan</li> <li>Tx</li> <li>79371</li> </ul>	
	Phone			555-555-5478	
				0 222-222-24/8	
The U	lser has three	options on how to res	olve the Conta		
	Link to Mast	options on how to res t <b>er</b> – keep the contac		ct is duplicated:	and links the correspo
				ct is duplicated:	and links the correspo
1.	Link to Mast entity.	t <b>er</b> – keep the contac	t under the Ma	ct is duplicated: aster Entity (Site)	and links the corresponding the dup
1. 2.	Link to Mast entity. Ignores – lea notification.	t <b>er</b> – keep the contac	t under the Ma duplicate & give	ct is duplicated: aster Entity (Site) e the user the opt	



Salutation:	•	Suffix	Email 2: Email 3:	frans@noemail.com	Work: Cell: Home: Mail Herge	555-555-1313 555-555-1616	ext:		Shelby's Bridge Thrift 103 Main Street Sudan, Tx 79371 555-555-5478 535-5 www.shelbysbridge.org
Active: Addresses	Yes T	5	Communic	cation Method:				¥	
Detail Groups Me	Linked 3	Discussions	Activity	Notification Project	Sync List	History			
	nmunic sion Meth	od: All							
Company L		(SB-0001) *Second							lental Health (SMITH20)

#### CRM: How to Update a Contact from Active to Inactive

**NOTE:** It's recommends that any Contact that has been created in iChannel should not be DELETED; yet marked as "Inactive". Therefore, if you need to active the contact record, it record will not have to be created for the beginning.



### CRM: How to Move a Contact

A user might need the ability to move a contact from one Entity (site) to another Entity (site). This might be due to a contact is added to the wrong Entity (Site) by accident. It is also used when a group of prospects contacts are added to a single entity (site). Once there is a need to store documents, the company Entity (Site) is created and the contact is moved. The destination Entity must exist before the move. The ability is controlled by security. In order to move a contact, the user must have RPT access to the Contact/CRM Contact module.

cont	act, the user must have RPT access to the Contact/CRM Contact module.
Steps	s for How to Move a Contact
Step	Action
1	<ul> <li><i>Click</i> the <b>Contacts</b> tab from the Main Banner. <i>Search</i> for the <b>Contact</b> by using the <b>filter options</b>. From the Contact Search Result window, click the contact name and link.</li> <li><i>Anywhere</i> in iChannel that you can locate a Contact and access their Contact Detail screen,</li> </ul>
	you can mark a Contact as Inactive.
	Detail: SNU betry de Arkshad       National Project 3         Detail: SNU betry de Athen 3       National 2         Contact 9       Decasility Paula Underwood 2         Contact Detail: Paula Underwood 2       Arkshad         Last:       Underwood 2         Notioner       Fest:         Salutation:       Notioner         Detail:       Detail: Paula Underwood 2         Salutation:       Notioner         Salutation:       Notioner         Detail:       Detail:         Detail:       Detail:         Detail:       Detail:         Salutation:       Notioner         Salutation:       Notioner         Detail:       Detail:         Detail:       Detail:         Detail:       Detail:         Salutation:       Notioner         Salutation:       East:         Detail:       Detail:         Detail:       Detail:         Detail:       Notioner         Salutation:       East:         Detail:       Detail:         Detail:       Detail:         Detail:       Detail:         Detail:       Notioner         Detail:       Detail:
	Once on the <b>Contact Detail</b> screen, <i>click</i> the <b>More drop-down</b> list and <i>select</i> <b>Re-assign Entity</b> . The <b>Entity Information</b> screen displays.
2	<ol> <li>Search for the Entity by using the Entity Lookup or perform a search in the Entity Name field, click Lookup.</li> </ol>
	2. If the entity (site) is not already created, the user can <b>Create a New Entity</b> .
	3. Click Save.
	Detail       Contact 4       Discussion 6       Activity 5       Notification 2       Project 1       History         Entity Information
	If your Organization uses an iChannel Import to populate iChannel with Contacts, please contact your System IT Administrator before performing this feature.

#### CRM: Discussion Tab

1

#### CRM – Discussion Tab

#### Step Action

The **Discussion tab** will display the total number of internal discussions. The Discussion tab provides a blog-like area to add and share notes on the Entity (Site) level, the Contact level and the document level.

Detail Contact <sup>16</sup> Discussion <sup>3</sup> Ac Entity Discussions	tivity <sup>31</sup> Notification <sup>1</sup> Project <sup>6</sup> History	
Filter by Subject:All Subjects	Add New) (+ Expand All)	- Contract All
Payment Received \$4k 08/30/2019 (Reply)	bobby.underwood 8/28/19 1:59pm	۵ 🖇
Test Discussion this is only a test and nothing but a test Repty	bobby.underwood 7/11/19 11:34am	۵) 🖉 🕸
System Requirement Spec Overview Review with Shelby's system spec overview (Repty)	bobby.underwood 6/25/19 9:53am	🍺 🌒 🚖 🗙

#### 😒 CRM: Activity Tab

Each Acti correspo		d to the Rer 1 informati	ninders Calendar, a on. Activity <sup>31</sup>	ever been created fo and each participant the <b>red number</b> in	activity is linked to t			
Additiona Calendar	and My Pro	es can be v	viewed and access ets)	n, the Contact tab, a ed from the Dashbo				
	Action Action	Activities						
	arc - Discussion - Act	1 Fiter: All	Timeframe: All     Activity Count: S0	Show: Completed Puture Project Activities	Add Activity  Add Activity Add Activity Add Activity Aedin Call Call Task			
Activities Type St Request Request	<b>tus Start</b> 10/11/2019 10:45 AM 10/11/2019 10:40 AM	Exclude Stop 10/14/2019 11:45 AM(73) 10/11/2019 11:40 AM(1)	Emails Begins with: Subject: Sec Subject Greg Test For Request Doc on Portal Greg Test For Request Doc on Portal	andary Contact:  Contacts  Contacts  Greg Kirkham , Boby Underwood  Greg Kirkham , Boby Underwood  Greg Kirkham , Boby Underwood	Add Activity Meeting			
Activities Type St Request Request	Nus Start 10/11/2019 10:45 AM 10/11/2019 10:45 AM 10/11/2019 10:39 AM 10/11/2019 10:38 AM 10/11/2019 10:34 AM	Exclude Stop 10/14/2019 11:45 AM(73)	Emails Begins with: Subject: Sec Subject Greg Test For Request Doc on Portal 3	ondery Contacts Eilitee Contacts Shelby's Bridge Thrift Shop Greg Kirkham, Bobby Underwood Shelby's Bridge Thrift Shop	Add Atshery Cells Call Brail Brail Notes Part Vote Personal Part H Notes Part Scaling Part Notes Part Part Notes Part Notes Part Part Notes Part Notes Part Part Notes Part Part Notes Part Part Part Notes Part Part Notes Part Part Part Part Part Part Part Part			

Click Save.

### 😒 CRM: Notification Tab

#### **CRM** – Notification Tab

#### Step Action

1

The **Notification tab** will display all notifications for the entity(site) or for a contact. Notification<sup>2</sup> the **red number** indicates the number(s) of notifications associated with the entity (site) or contact.

Notifications allows for the creation of email reminders to be automatically sent to a person or a group. Features include options for the time, frequency and recipient groups or individual for the reminder. **NOTE:** iChannel Notifications simply servers as a group or individual reminder and is not to replace MS Outlook Calendar for meetings, alarms, etc.



#### CRM: Project Tab

CRM	– Project Tab
Step	Action
1	The <b>Project tab</b> will display all projects (workflows) associated with the entity (site). Project <sup>1</sup> the <b>red number</b> indicates the number of projects (workflows) associated with the entity (site) or contact.
	From the Project window, a user can view and add a Project (Workflow). Additionally, the user can do a search to narrow down the number of projects (workflows) displayed on the grid. Users can work with an existing project (workflow) by add new Task from the Project (Workflow) page.
	Users can also click on a Project (Workflow) name link to view the Project Detail Screen. Users can also click on a Task link to view the Activity Detail Screen.

# **iCHANNEL**

B 11/0 Test Project SRU	Norm	al Implementation New Sales In Proc		rood. Dee Lowrey				Bobby Underwood 9/ Bobby Underwood 8/	/13/2019 8/31/2019 /9/2019
Task			covery cristery	Classify	Type	Status	Assigned		Due
Add Refresh									
1040 Tax Doc					Task	Waiting on Client			79/06/2019 11:07 AM
Workflow Planning Meeting				i-Workflow Configuration					04/12/2016 12:00 AM
Client identifies standard workflow values				i-Workflow Configuration					04/12/2016 12:00 AM
Client provides templates & tasks per service are				i-Workflow Configuration			Bobby Underwood		04/12/2016 12:00 AM
Setup fields in tCodes				i-Workflow Configuration			Bobby Underwood		04/12/2016 12:00 AM
Add Sample Templates				i-Workflow Configuration			Bobby Underwood		04/12/2016 12:00 AM
Training on Adding & Maintaining Templates				i-Training	Implementatio		Bobby Underwood		04/12/2016 12:00 AM
Training on Workflow process				i-Training	Implementatio		kate lyn		04/12/2016 12:00 AM
Request Workflow Backup (if needed)				i-Workflow Configuration			Jacklyn Cohen		04/12/2016 12:00 AM
Workflow Conversion from other system				i-Workflow Configuration			James Philips		04/12/2016 12:00 AM
Test Demo					Task	In Process	Bobby Underwood	(	08/09/2019 04:58 PM
Add – <i>click</i> the Add	<b>d</b> butto	on to crea	ite a	new l	Proj	ect (\	Vorkfl	ow).	

- for a project.
- **Project Name** *click* the **project name link** to open the **Project Details screen**.
- **Task Name** *click* the **task name link** to open the **Activity Detail screen**.

### CRM: History Tab

tep	Action				
-cp					
1	The <b>History tab</b> will display all ch	hanges made to t	he Entity (S	ite) CRM record	<ol> <li>Displayed by data</li> </ol>
1		0			, ,
	time, user, changes to fields wit	h the previous a	nd new valu	Jes.	
	Detail: SAU Entry dar # ****			New Save Deck Site Add Contact	1
	Detail Contact <sup>4</sup> Discussion <sup>4</sup> Activity <sup>3</sup> N	iobification <sup>4</sup> Project <sup>4</sup> History	President Malue	New Value	
	Modified: 9/30/2019 1:29:50 PM - By: bobby.underwood	CADDRESS1	Previous Value 1880 Stevens Bluff Lane	390 Bonnavale Drive	
	Nodified: 9/30/2019 1:29:50 PH - By: bobby.underwood	CPHONE1	404-733-0300	404-733-0301	
	Hodified: 9/30/2019 1:29:50 PH - By: bobby.underwood	CTYPE	Client		
	Modified: 9/30/2019 1:29/50 PM - By: bobby.underwood	MNOTE			
	Hodfled: 6/6/2019 3:08:47 PH - By; bobby,underwood Hoddled: 6/6/2019 3:08:05 PH - By; bobby,underwood	MNOTE CADDRESS1		1550 Stevens Bluff Lane	
	Holdheid (6)(2019 3)(6)(5) FH - BU bolby underwood	CCITY		Dallas	
	Nodified: 6/6/2019 3:06:05 PM - By: bobby.underwood	CSTATE		TX	
	Hodffed: 6/6/2019 3:06:05 PH - By: bobby.underwood	CPOSTALCDE		75208	
	Nodified: 6/6/2019 3:06:05 PM - By: bobby.underwood	CCOUNTRY		United States	
	Hod/Red: 6/6/2019 3:06:05 PH - By: bobby.underwood	CPHONE1		404-733-0300	
	Hodified: 6/6/2019 3:05:05 PH - By: bobby.underwood	CINDUSTRY		Consulting	
	Modified: 6/6/2019 3:06:05 PM - By: bobby.underwood Modified: 6/6/2019 3:02:25 PM - By: bobby.underwood	MNOTE			
	Hodinedi 6/6/2019 3/02/25 PH - By: bobby.underwood	CUDF11	nobody	Underwood	
	Nodified: 6/6/2019 2:33:03 FM - By: bobby.underwood	CTYPE	Lead	Client	
	Hodfied: 6/6/2019 2:53:03 PH - By: bobby.underwood	CTYPE	Cient	Lead	
	Hodified: 6/6/2019 2:53:03 PH - By: bobby.underwood	CUD#3		none	
	Hodfled: 6/6/2019 2:53:03 PH - By: bobby.underwood	CUDF4		at	
	Hodfied: 6/6/2019 2:53:03 PH - By: bobby.underwood Hodfied: 6/6/2019 2:53:03 PH - By: bobby.underwood	CUDP10 CUDP11		0 nobody	
	Modified: 6/6/2019 2:53:03 PM - By: bobby.underwood Modified: 6/6/2019 2:53:03 PM - By: bobby.underwood	0.093	5108	nootay	
	Hodined: 6/6/2019 2:53:03 PM - By: bobby.underwood Hodified: 6/6/2019 2:53:03 PM - By: bobby.underwood	CUDF4	cst		
	Modified: 6/6/2019 2:53:03 PM - By: bobby.underwood	CUDF10	0		
	Hodfied: 6/6/2019 2:53:03 PH - By: bobby.underwood	CUDF11	nobody		
	HodiFed: 6/6/2019 2:53:02 PH - By: bobby.underwood	CPEIN		SRU.001	
	Hodfled: 6/6/2019 2:53:02 PH - By: bobby.underwood	CTYPE	Lead	Clert	
	Hodfied: 6/6/2019 2::33:02 FM - By: bobby.underwood	NAPPROVAL	2	1	
	Hodified: 6/6/2019 2:53:02 PH - By: bobby.underwood Modified: 6/6/2019 2:53:02 PH - By: bobby.underwood	CUDF4 CUDF10		est	
	Hodined: 6/6/2019 2:53:02 PM - By: bobby.underwood Modified: 6/6/2019 2:53:02 PM - By: bobby.underwood	CUDF11		nobody	
	Nodified: 6/(2019 2:3:3:0:2 FM - By: bobby.underwood	CUDF3		none	
	Hodfied: 6/6/2019 2:53:02 PH - By: bobby.underwood	CSERVICES			
	Hodified; 6/6/2019 2:53:02 PH - By: bobby.underwood	MINOTE			
	Hodified: 6/6/2019 2:53:02 PH - By: bobby.underwood	MWORKFLOW			
	Hodfied: 6/6/2019 2:53:02 PH - By: bobby.underwood	NAPPROVAL	1	2	
	Hodified: 6/6/2019 2:53:02 PH - By: bobby.underwood Hodified: 6/6/2019 2:53:02 PH - By: bobby.underwood	CTYPE	Client SRU.001	Lead	
	Modified: 6/6/2019 2:53:02 PH - By: bobby.underwood Modified: 6/6/2019 2:53:02 PH - By: bobby.underwood	CPEIN NAPPROVAL	5RU.001 2		
	Hod/Red 6 (6/2019 2:53:02 PH - By) boby, underwood	CTVPE	Prospect	Clert	

# 🕥 CRM: Groups

In iChannel, there are two types of CRM Groups/List, Personal and Global.

Personal – Personal Lists are private to each user but can be accessed by your System Administrator. The most common personal list is a list from Outlook. Each user specifies the contacts they want to sync with Outlook. Personal List names are created by iChannel Implementation team and are customizable to your organization. In general, they are called Personal List 1, 2, etc. and the purpose is determined by your users. For example, a salesperson may use Personal List 1 for prospects and a manager may use the same list for the staff. Global – can be created by your users (with security access) and are accessible to all users in iChannel. Example: list names include Newsletters, Holiday Cards, Support Contacts, Marketing Contacts, etc. These lists are widely used by marketing staff.

# CRM: How to Add a Global Group

CRM	– How to Add a Global Group	
Step	Action	
1	Groups are a nice feature when a database becomes so large that filtering does not narrow the search enough. Groups could also be setup for projects needing contact from multiple Entity/Sites. <i>Click</i> the Contacts tab from the Main Banner. In the Groups/List section, <i>click</i> Add.	Files       Contacts       Projects       Pipeline       Calendar       Routing       New Routing       System         Space       Show up to:       10 • • Contact - Entity       Smarch       Nore •         Contact Info       Entity Info       Name: •       DBA:       DDA:       DDA:         City:       DD:       DC:       Other       Other       Other       Other       Other         State:       DVp:       Other       Other
2	<ol> <li>On the Group/List screen, enter a Nathe Group/List.</li> <li>Enter a Description (optional) in description section.</li> <li>Owner drop-down list select a user to owner of the group.</li> <li>Click Add.</li> </ol>	n the SRU Training 1 Description: Group of users in the training Separtment 2
3	<b>Contacts</b> tab, <i>add</i> all the contacts to the <b>S</b> <b>Contacts</b> section. Users can also do a search Last, First, Entity to quickly locate contacts.	
4	multiple Entities (Sites).	mails with group of users that may expand across il screen displays. <i>Compose</i> an email as normal and

Notes



# Since the contacts to Personal List | Global Groups via the Contact Search

Status

off

Stop

CRM	- How to Add Contacts to Personal List	Global Groups via the Contact Search
Step	Action	
1	Click Contacts from the main ribbon. The Contact   Entity search screen will display. In the Groups / List Name field, enter or search for the group / lists to add the contact. Click Search.	File     Contact     Popela     Popela     Popela     Round     Round     New Rounding     System
	On the <b>Group / List Results</b> , select your <b>Group or List</b> .	
2		<i>highlight</i> contacts in the <b>Available Contacts</b> list to highlight multiple contacts at once.

#### Module 4: iChannel CRM

## **iCHANNEL**



iChannel **Workflows (Projects)** is the execution and automation (iChannel Customization) of business processes; where task, information and documents are passed from one person to another for action according to a set of procedural rules. Workflows involves work by one or more users, and transforms materials, information or services.

By defining workflow, you are creating a sequence of tasks that processes a set of data. Workflows occur across every kind of business and industry. Anytime data is passed between users and/or systems, a workflow is created. Workflows will help an organization to streamline and automate repeatable business tasks, minimizing room for errors and increasing overall efficiency.



Workflows are highly configurable to meet many different business processes. To learn more about Customized Workflows, please contact your iChannel Implementation Representative

#### **Module Overview**

The follow exercise will introduce the building blocks and tools of the **iChannel Workflow**.



### SiChannel Dashboard – Workflow Widgets

It's recommended when working with iChannel Workflows, to configure iChannel Dashboard with widgets to have manage your Task, Projects and Deliverables. The below table outlines the widgets related to working with workflows.

	My Deliverables	This widget is for users of the Workflow Module that are using the Custom Deliverable grid. Displays the Deliverables and due dates for the Projects you are assigned to. Each Deliverable will be associated to a status to show their progress. <b>RED</b> – overdue. <b>YELLOW</b> – onhold. <b>GREEN</b> – in-progress.
Projects	My Projects	My Projects (Workflows) display all the workflows where the user is listed as the "primary" contact person. Tasks are listed by the order number. Viewable information includes the project name, due date and any assigned Workflows. Sites listed for the workflow are also displayed in the widget. Each Workflow will be associated to a status to show their progress. <b>RED</b> – overdue. YELLOW – on-hold. <b>GREEN</b> – in-progress.
	My Tasks	Display a user's designated tasks that have not been completed. Clicking on the checkmark icon (far right) will mark the task as "Complete". Use the Assigned drop-down list to see other users assigned Tasks, Sites listed within the widget.

To learn more about how to Customize your dashboard with workflow widgets, please click the following link:

iChannel Dashboard – Customize Your Dashboard Layout

Project Dashboard ~							🕼 Edit 🌰	Manage 💿
My Tasks								o
Assigned: Underwood,	Bobby 🔻 Nothi	ng selected	- <b>7</b> Ø	La l				v
Assigned. Underwood,		ng selected ask	•	Entity	- C	atus 🔺 Sta	rt ≙ D	lue ÷
в	usiness Death Certificate	Ion	SRU Inc.	(SRU75208)	Not In	10/22/2019	10/29/2019	C
	avis & Mary Flowers Shop			·,				
E	ngagement Letter		SRU Inc.	(SRU75208)	Not Started	10/21/2019	10/22/2019	8
Da	avis & Mary Flowers Shop							
	ngagement Letter ary's Cleaning Service		GBK Inc.	(GBK30066)	Not Started	10/21/2019	10/22/2019	2
Total: 3				Show 25 V				< 1 >
	Order	<ul> <li>Davis &amp; Mary Flowers</li> </ul>	Shop	Project		Status Not Started	Due 4/15/2020	÷
		SRU Inc. (SRU75208)	i onop					
C Refresh								
	Task	Classify		Status Not Started	Debte Hadressed Over	Assigned		Due
			Task	Not Started	Bobby Underwood, Greg Meredith Jolly	Kirknam		in a day
Engagement Letter	ato							in 9 days
Engagement Letter Request Tax Documer			Task					in 8 days
Engagement Letter	icate		Task Task Task	Not In Not Started	Bobby Underwood Meredith Jolly			in 8 days In 8 days in 10 days
Engagement Letter Request Tax Documer Business Death Certifi	icate		Task Task	Not In	Bobby Underwood			in 8 days

# SiChannel Workflow Search Screen

From the Main Banner, click

. The Project Search screen

*will display.* From the Project Search screen users can search for projects and task by identifying advanced search options in any of the fields.

	Files	Contacts	Calendar	Routing Proje	cts Pipeline	Pipeline System				🔲 In	clude Inactive Search 🛛 🛛 🖉 🚨 💷				
Projects Search															
Search											Pro	ject Rollover	Add Rep	iorts • >	
Projects:				Entity:		<ul> <li>Type:</li> </ul>	T	SubType:	<b>T</b>		Year:		Period End:	•	
Status:		۲		Interna		<ul> <li>Primary:</li> </ul>	•	Due Date:	То		Rollover:	•			
				Save Crite	ria Clear Saved Cri	teria Expanded I	Results To Excel	Order:	▼ Show up to: 100 ▼	Search					

	Project	This field allows a user to search for a Workflow (Project) by name. Use the checkbox to add the
		additional search for <b>Begins with</b> to the search for names that begin with your search criteria.
	Status	Click the Status drop-down arrow to select a status search criteria. This field is highly customizable;
		please contact your System IT Administrator to learn more.
	Entity	Click the Entity drop-down arrow to select an entity. Hold down the Shift or ctrl keys to select multiple
		entities. To search for all entities, leave the field <b>blank</b> .
	Internal	Click the Internal drop-down arrow to search for a list of contacts for the projects. Hold down the
		Shift or ctrl keys to select multiple contacts. To search for all internal contacts, leave the field blank.
S	Туре	Click the Type drop-down arrow to select a type search criteria. This field is highly customizable;
σ		please contact your System IT Administrator to learn more.
<b>D</b>	Primary	<i>Click</i> the <b>Primary drop-down arrow</b> to select a contact identified as a primary contact for a Workflow.
	Sub Type	Click the SubType drop-down arrow to select a subtype search criteria. This field is highly
		customizable; please contact your System IT Administrator to learn more.
	Due Date	To search for workflows between a <b>Due Date</b> range, <i>click</i> the <b>date-pickers</b> to set dates.
5	End Date	
earch Fields	Year	To search for workflows for a particular <b>Year</b> , enter a <b>four-digit (XXXX) year</b> .
<b>O</b>	Period End	To search for a workflow for a particular <b>Period End</b> , <i>click</i> the <b>drop-down list</b> and <i>select</i> a period.
Š	Rollover	To search for a workflow by <b>Rollover</b> , <i>click</i> the <b>drop-down list</b> and <i>select</i> either <b>Yes</b> or <b>No</b> .
Project	Save Criteria	Click the Save Criteria button to save the project search fields entries for future searches. This is
		useful when repeatedly searching for the same type of project or doing repetitive searches
	Clear Saved	Click the Clear Saved Criteria to clear any saved search criteria.
Ö	Criteria	
	Expanded	Check Expanded Results to show Notes in your Project Search.
	Results	
	To Excel	Check To Excel to create a spreadsheet from your Project Search.
	Order	Click the Order drop-down list to select
	Show up to	Click the Show up to drop-down list to select the number of results to show in the Project Search
	-	results.
	Reports	Click the <b>Reports drop-down</b> list to select a Project Report to generate.

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# 🕥 Workflow: How to Add a New Workflow (Project)

There are *four basic steps* when creating a new **Workflow (Project)**:

- 1. Create a Workflow (1-time workflow vs. pre-defined workflow templates)
- 2. Assign to a Site (Entity)
- 3. Assign Contacts
- 4. Identify and Assign Task(s) to Contacts



Please contact your System IT Administrator or iChannel Implementation Representative to learn more about "working with Workflow TEMPLATES\_"

# Workflows – How to Create a Workflow Step Action Projects: Select Projects from the Main banner. The Project Search window displays. Click Add.

Projects Search				ANNEL	Search
Projects Search					
Search					Project Ron er Add Report
Projects:	Entity:	Type:	<ul> <li>SubType:</li> </ul>	•	Year: Period I
Status:	Internal:	Primary:	Due Date:	🔳 То	Rollover: v

#### The **Projects** screen will display.

Completed										
Priority:	Normal V Order:	Year: 2019 Rollove	er.			2 Centity:			SRU Inc.	
Type:	Business Services *					Primary Contact:			Underwood, Bobby	
Subtype:	Business 🔻	<b>(1)</b>				Other Contact:				
Status:	Not Started					Project Security:			Private	
Start:	10/01/2019 🔲 Due:	2/31/2019				Email Project Changes to:			Internal Users All Users	
More										
	4									
Detail D	Jiscussions Tasks 3	Documents History								(Add T
	Jiscussions Tasks 3	Documents History Custom Fields	Classify	Status	Start/Due	Assigned	Emai		Notes	(Add Ta
Order Su	ubject						All Notifications	Completed Only	Notes	(Add T.
Order Su				Status Completed • 10/21/2019 02:37 PH Bobby Underwood	Start/Due	Assigned (Bobby Underwood •			Notes	(Add T
Order Su	ubject			Completed • 10/21/2019 02:37 PH Bobby Underwood Completed • 10/21/2019 02:37 PH	09/23/2019		All Notifications	Completed Only	lotes	(Add T.
Order Su	ubject scovery and Contract Call			Completed V 10/21/2019 02:37 PM Bobby Underwood Completed V	09/23/2019 10/01/2019 10/02/2019	Bobby Underwood 🔹	All Notifications	Completed Only	Notes	(Add T

1

Create a Workflow (1-time workflow vs. pre-defined workflow templates).

 Workflow (Project name) – in the Project name field, enter a descriptive Workflow (Project) Name to identify the workflow (project).



	Selected Entity         Conarc Internal Site         TEMPLATE_INTERNAL         TEMPLATE_USER CONFERENCE         TEMPLATE_VENDOR         TEMPLATE_VENDOR         TEMPLATE_MARKETING         TEMPLATE_HUMAN RESOURCES         Implementations         Product Releases         TEMPLATE_TRAINING AND SERVICES         TEMPLATE_TATAL         GBK Inc.
<i>Click</i> the <b>Cont</b> to the new wo	act tab or <i>click</i> Primary Contact: to begin a search for a contact(s) to assign co
	acts will display in the <b>Contact Search</b> area. To perform a detailed search specific values in the: First Name, Last Name, Entity Name or Active Only.
	Soccine values in the range lage ranne, East ranne, Entity ranne of Active Oniv.
	additional contacts to the workflow (project) by selecting contact(s) and ac
the <b>Other Con</b>	additional contacts to the workflow (project) by selecting contact(s) and ac tact area.
the <b>Other Con</b>	additional contacts to the workflow (project) by selecting contact(s) and ac <b>tact</b> area.
the <b>Other Con</b>	additional contacts to the workflow (project) by selecting contact(s) and ac tact area.

Order	Subject	Custom Fields	Classify	Status	Start/Due	Assigned	Fr	mail
		custom rielus	Classify	Status	July Due	Assigned	All Notifications	Completed Only
in th	e Tv	<b>ne</b> field						
				e dro	ob-ac	wn lis	t.	
					-1			
Icor	<b>1</b> to	enter t	he st	art o	date a	and ei	nd da	ate for the
ll-day	evei	nt <i>, sele</i>	ct the	All	Day E	vent c	heck	box.
					• •		•	•
nes t	he o	rder fo	r the	Tas	k(s) ir	n your		Subject
	•	• • •		20, 3	30, eta	c. This		Request Tax Documents
				k wi	ll defa	ault to	25	Business Death Certificate
l loca	ite th	ne Site	(Entit	y) to	o assig	gn the		и 
					dium,	, or <b>Lo</b>	w.	
remo	ved s	selected	d sect	ion,	click	Remove Se	lected	
	in the, a <b>C</b> o def <b>Icor</b> II-day e Wo tity), nes t order ask" is not I loca Id can at ar	in the <b>Ty</b> e, a <b>Class</b> o defined e <b>Icon</b> to II-day even e Workflor tity), click nes the o order your cask" when is not defi I locate the Id can be: at are rela	in the <b>Type</b> field e, a <b>Class</b> type fro o defined the sta e <b>Icon</b> to enter t <b>Il-day event</b> , <i>selec</i> e Workflow (Projectity), click the dro nes the order fo order your Task(s) cask" when needed is not defined, the d locate the Site ld can be: <b>Blank</b> , at are related to ore-populated co	in the <b>Type</b> field. e, a <b>Class</b> type from th o defined the status. e <b>Icon</b> to enter the st II-day event, <i>select</i> the e Workflow (Project) w tity), click the drop-do nes the order for the order your Task(s): 10, cask" when needed. is not defined, the Tas I locate the Site (Entit Id can be: <b>Blank, High</b> , at are related to the T	in the <b>Type</b> field. e, a <b>Class</b> type from the dro o defined the status. e <b>Icon</b> to enter the start of II-day event, <i>select</i> the <b>All</b> e Workflow (Project) will d tity), click the drop-down a nes the order for the Task order your Task(s): 10, 20, 3 cask" when needed. is not defined, the Task wi d locate the Site (Entity) to ld can be: <b>Blank, High, Me</b> at are related to the Task. ore-populated contact list,	in the <b>Type</b> field. e, a <b>Class</b> type from the drop-do o defined the status. e <b>Icon</b> to enter the start date a II-day event, <i>select</i> the <b>All Day E</b> e Workflow (Project) will display tity), click the drop-down arrow nes the order for the Task(s) ir order your Task(s): 10, 20, 30, etc cask" when needed. is not defined, the Task will defa d locate the Site (Entity) to assig ld can be: <b>Blank, High, Medium</b>	in the <b>Type</b> field. e, a <b>Class</b> type from the drop-down list o defined the status. e <b>Icon</b> to enter the start date and en II-day event, <i>select</i> the <b>All Day Event c</b> e Workflow (Project) will display. If the tity), click the drop-down arrow and se nes the order for the Task(s) in your order your Task(s): 10, 20, 30, etc. This cask" when needed. is not defined, the Task will default to d locate the Site (Entity) to assign the ld can be: <b>Blank, High, Medium</b> , or <b>Lo</b> at are related to the Task.	in the <b>Type</b> field. e, a <b>Class</b> type from the drop-down list. o defined the status. <b>a Icon</b> to enter the start date and end da <b>l</b> -day event, <i>select</i> the <b>All Day Event check</b> <b>e</b> Workflow (Project) will display. If the pro- tity), click the drop-down arrow and select. Thes the order for the Task(s) in your order your Task(s): 10, 20, 30, etc. This task" when needed. is not defined, the Task will default to <b>d</b> locate the Site (Entity) to assign the <b>l</b> d can be: <b>Blank, High, Medium,</b> or <b>Low</b> . at are related to the Task. ore-populated contact list, <i>click</i>

Complet	ted				
Priority:	Normal Vorder: Year: 2019	Rollover	Entity:	SRU Inc.	
Туре:	Tax •		Primary Contact:	Underwood, Bobby	
Subtype:	Tax Planning 🔻		Other Contact:	Kirkham, Greg	
Status:	Not Started		Project Security:	Private	
Start:	10/01/2019 💷 Due: 12/31/2019 📰		Email Project Changes	to: Internal Users All	
					I Users
					l Users
× More Notes: Detail	Discussions Tasks Documents	History			l Users
Notes:	Discussions Tasks Documents	History			l Users
Notes:	Discussions Tasks Documents Subject Custom Fields	History Classify Status		d Email	ompleted

The final step in creating a new Workflow (Projects) is to Identify and Assign Task(s) to the Workflow (Projects) | Contact(s).

Detail Discussions Tasks Documents History

Click the Tasks tab, click Add Task.

4

The **Activity** window will display.

- Name enter the Name of t Workflow (Project) Activity.
- **Type** by default, **Task** will pop •
- (Optional) Class select, if app
- Status click the drop-down and •
- Start | End Date select the • requested Activity. If the activit
- **Project** by default, the name to be assigned to a different Sit
- Projects Order this field det workflow (project).
  - NOTE: it's recommende allows the user to add "
  - NOTE: if the Projects O "999"
- **Entity** *click* in the **Search** fiel • Task.
- (Optional) Priority this option
- (Optional) Note enter any no
- Contacts -
  - Highlight a contact from
  - Highlight a contact fron



(Add Task)



Double-click a Con	itact to <b>Add</b> a conta	ct Double-c	lick to <b>R</b>	emove a co	ontact	rom	the Remove Selected section
				a. 11			
	To select multipl	e <b>Contacts</b> , hold	down th	ne Ctrl key	and se	lect <b>C</b>	ontacts
Save		- II II - <b>T</b> I /					
k Repe	eat Step 4 until	all the Task(	s) asso	ociated v	with t	he V	Vorkflow (Project) have
ined.							
incu.							
Detail Discussions Tasks 6	Documents History						
Detail Discussions 185KS							
	inser,						Add Tasi
Order Subject	Custom Fields Classify	Status Si	itart/Due	Assigned		Email	(Add Tasi
Order Subject		Status Si	itart/Due	Assigned	Notifi	Email II Comple	Notes
Order Subject		Completed • 0	5/06/2016	Assigned Lacy Magby	Notifi	U Comole	Notes
Order Subject		Completed • 0	5/06/2016		Notifi	ul Comple ations Only	Notes
Order Subject 999 Notes from Colleen on ARM Transfer		Completed • 0 05/06/2016 09:47 AM 0 Lacy Magby Completed • 0	25/06/2016 25/06/2016 25/06/2016 25/06/2016		Notifi	Comple ations Only	Notes ad Work with Denise. Hank is the COO, super nice guy. HAD A CALL WITH DENISE TO MAKE SURE THINGS WERE
Order Subject 999 Notes from Colleen on ARM Transfer		Completed         0           05/06/2016 09:47 AM         0           Lacy Magby         0           Completed         0           05/06/2016 11:35 AM         0	05/06/2016	Lacy Magby	Notifi V	Comple ations Only	Notes and Work with Denise. Hank is the COO, super nice guy.
Order Subject (999 Notes from Colleen on ARM Transfer 10 Contact One		Completed         •         0           05/06/2016 09:47 AM         0         0           Lacy Magby         Completed         •         0           05/06/2016 11:35 AM         0         0           Lacy Magby         Completed         •         0	25/06/2016 25/06/2016 25/06/2016 25/06/2016	Lacy Magby	Notifi V	All Completions Only	Notes Het Work with Denise. Hank is the COO, super nice guy. HAD A CALL WITH DENISE TO MAKE SUBE THINGS WERE GOING WELL ALL IS GOOD. DEE AND RICKY ARE WORKING ON *
Order Subject (999 Notes from Colleen on ARM Transfer 10 Contact One		Completed         •         0           05/06/2016 09:47 AM         0           Lacy Magby         •         0           Completed         •         0           05/06/2015 11:35 AM         0         0           Lacy Magby         •         0           Uscy Magby         •         0           Vio Started         •         0           05/06/2015 10:45 AM         •         0	15/06/2016 15/06/2016 15/06/2016 15/31	Lacy Magby	Votifi	All Completions Only	Notes Het Work with Denise. Hank is the COO, super nice guy. HAD A CALL WITH DENISE TO MAKE SUBE THINGS WERE GOING WELL ALL IS GOOD. DEE AND RICKY ARE WORKING ON *
Order Subject 099 Notes from Colleen on ARM Transfer 10 Contact One 20 Contact Two		Completed         •         0           05/06/2016-05:47 AM         0           Lacy Magby         •         0           05/06/2116-05:47 AM         •         0           05/06/2016-01:35 AM         •         0           05/06/2016-01:35 AM         •         0           05/06/2016-01:36 AM         •         0           05/06/2016-01:46 AM         •         0           Lacy Magby         •         •	25/06/2016 3 25/06/2016 3 25/06/2016 3 25/31/2016 3 28/01/2016 3 28/30/2016 3	Lacy Magby	Vectifi V	All Complete	Notes Het Work with Denise. Hank is the COO, super nice guy. HAD A CALL WITH DENISE TO MAKE SUBE THINGS WERE GOING WELL ALL IS GOOD. DEE AND RICKY ARE WORKING ON *
Order Subject 999 Notes from Colleen on ARM Transfer 10 Contact One 20 Contact Two		Completed         •         0           03/06/2016 09:47 AM         Locy Magby         •         0           Completed         •         0         0           03/06/2016 01:35 AM         •         0         0           03/06/2016 11:35 AM         •         0         0           03/06/2016 11:35 AM         •         0         0         0           03/06/2016 11:35 AM         •         0	55/06/2016 3 55/06/2016 3 55/05/2016 3 55/31/2016 3 88/01/2016 3 22/01/2016 3	Lacy Magby	Vectifi V	All Completions Only	Notes Het Work with Denise. Hank is the COO, super nice guy. HAD A CALL WITH DENISE TO MAKE SUBE THINGS WERE GOING WELL ALL IS GOOD. DEE AND RICKY ARE WORKING ON *
Order Subject 999 Notes from Colleen on ARM Transfer 10 Contact One 20 Contact Two		Completed         •         0           03/06/2016 09:47 AM         Locy Magby         •         0           Completed         •         0         0           03/06/2016 01:35 AM         •         0         0           03/06/2016 11:35 AM         •         0         0           03/06/2016 11:35 AM         •         0         0         0           03/06/2016 11:35 AM         •         0	25/06/2016 3 25/06/2016 3 25/06/2016 3 25/31/2016 3 28/01/2016 3 28/30/2016 3	Lacy Magby	Veelfi	All Complete	Notes Het Work with Denise. Hank is the COO, super nice guy. HAD A CALL WITH DENISE TO MAKE SUBE THINGS WERE GOING WELL ALL IS GOOD. DEE AND RICKY ARE WORKING ON *
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#### **Tool Tip:**

**All Notifications** – if you are listed as a *Primary Contact* or *Secondary Contact* on a Workflow Project and **All Notifications** is checked. The contact(s) will receive notification when there is "*any*" change made to the Task. (I.e., Status, Assigned, etc.)

**Completed Only** – if you are listed as a *Primary Contact* or *Secondary Contact* on a Workflow Project and **Completed Only** is checked. The contact(s) will "only" receive notification when the Status for the Task is set to "Completed".



#### Module 6: iChannelDesk

#### Welcome to iChannelDesk End User Training

iChannelDesk is an application that enables users to quickly perform frequent activities (task) from their desktop. iChannelDesk allows users to:

- Open iChannel document(s)
- Save email(s) directly from Outlook (or any email system) directly into iChannel
- Save document(s) directly to iChannel
- Soute document(s) directly to iChannel
- Save document(s) directly to IChannelDesk Monitor Folder (Pending Files)
- Sync Outlook Contacts into iChannel



Contact your IT System Administrator if you currently do not have iChannelDesk installed on your workstation.

This guide will provide step-by-step actions . . . . . .

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#### Module Overview

The follow exercise will introduce the building blocks and tools of the iChannelDesk.



#### How to Access and Start iChannelDesk



# **iCHANNEL**



#### 뇌 How to Customize iChannelDesk Toolbar

**iChannelDesk** Toolbar is easily customizable by each user and is unique to each user via the **Settings** feature. A few features that users can customize are:

- User ID (or your Subscriber ID) and Password
- Search Results document(s) to show
- Path to users Monitored Directory and Routing Queue UNC Path (IT System Administrator only)
- Appearance and Other Settings
- Sync feature (Contacts, Calendar/Tasks, Emails)
- Auto-Sync

Steps for How to Customize iChannelDesk Toolbar Step Action

## Module 6: iChannelDesk

# **iCHANNEL**





# \Sigma iChannelDesk – Main File Area

**iChannelDesk** main end-user window provides the user with the same functionality to perform several tasks like using the iChannel Client File Area.

- Search for Entities
- View My Entities, My Contacts, My Recent Entities
- View and Search for Client Document(s)
- Filter by Tags, Projects (Workflows)
- Drag-and-Drop Documents and Emails directly into iChannelDesk
- Print and Email Links directly from iChannelDesk

# 🕥 How to Search for an Entity

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# How to Add Document(s)

**iChannelDesk** has built-in intelligence to make storing client document(s) a quick and easy process. Users have the option to upload one document at a time, or by using the *Control (Ctrl) key* on your keyboard to select multiple documents when uploading. When uploading document(s) into iChannelDesk, there are two options:

- Copy this operation will make a copy of the source document from your local machine and make a new copy within iChannel. To copy, the user must also hold down the "CTRL" key when dragging
- Move this operation will permanently move the document from your local machine into iChannel.



When *uploading* a document into iChannel using iChannelDesk, you can: 2 Upload one document at a time Upload several document(s) at the same time Upload document(s) to different Entities, Categories, Tags, Projects as needed Add New Document(s) to iChannel using iChannelDesk d New to iChanne Clear List Select root site: Demo Include Inactive Search Dragged Files (1/3) Enter search term Mv Entities SRU Training Shelby's Bridg Туре Modified A My Contacts Smith Community Mental Healt JBC Market Pecent Entitie 2019 August GU... 2019 iChannel D... 9/4/2019 12:29:4... DOC nel D., 8/28/2019 8:39:5. Categories Administrative Audit Bond Communication Engagement Letters Training Workpapers Title Description 2019 iChannel Desk Installation Guide Subfolder ...\tax\  $\sim$ Year 2019 V V Permanent Status  $\sim$ Use Standard File Naming 🗹 Publish □· Tags (Right click on any tag to add a child tag) ---- Project/Opportunity |---Project/Opportunity----|- --Completed---- 2018-Tax Return-Non Profit \_04/12/19 -- Sample Moving Example \_04/15/19 -- Template\_Karen \_11/29/19 -- Tessing Status \_07/31/19 Add & Open Close Add Pending Files (0/0) 1. Click the box or boxes next to the document(s) name in the Dragged Files section. 2. Select either My Entities, My Contacts, Recent Entities to upload the document. 3. Select the Categories (Topic | Subtopic). 4. If the uploaded document title needs to be modified, update in the Title Description field. 5. Update the following fields as necessary: Subfolder **Year** – if the year is left blank, it will default to the current year. Status Permanent Publish 6. (Optional) Assign Tags or Project, as necessary. 7. Click Add & Open, Add, or Close.

### 뇌 How to Add an Email

As with adding document(s) to iChannel using **iChannelDesk**, you can use the same process to add **Emails** directly into iChannel. Emails are copied as an Outlook email file (.msg) in the File Area document list. To perform this task, Outlook must be running so iChannelDesk can open/read the email(s). Any attachments will be saved with the message. The same documents features apply to emails as with other document types.

To only add the attachment in the email to iChannel using iChannelDesk, open the email with the attachment. Click the attachment file(s) and drag and drop the attachment to the Save icon on the iChannelDesk toolbar.





### 🔁 How to Add a Document(s) – Routing Queue

To add document(s) to your **Routing Queue**, *drag and drop* the document(s) to the **Route** icon on the iChannelDesk Toolbar. The document(s) will appear in your routing "**Inbox**" in iChannel.

Step	s for How to Add a Document(s) – Routing Queue
Step	Action
1	Locate the document(s) that you want to upload to a Clients File Area.
	Click and Drag the document(s) over the Routing icon on the iChannelDesk Toolbar.
	The <b>Upload</b> window will display.
	Image: 94% complete         Copying 1 item from Downloads to bobby.underwood         94% complete         Image: Provide the second secon
2	<ul> <li>To view document(s) in the Route que, click the Route icon on the iChannelDesk toolbar.</li> <li>The Route folder will display.</li> </ul>
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### 뇌 How to Save Document(s) Directly to iChannelDesk – Monitor Folder

Create and Save new document(s) directly in iChannelDesk using the **Monitor Folder**. All document(s) that are created and saved directly to iChannelDesk using the Monitor Folder will appear in the **Pending Files** section of the File Area. The Monitor Folder feature is intended to make it easier for a user not having to save first to their local drive or to a network folder.

Open		*	Select root site:	Demo	~	
	Desced Files (0/0)		Enter search term:		Include Inactive	Search
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By *default*, when iChannelDesk is installed, the install will *create* a new folder in **Documents** called "i**ChannelDesk**".

<ul> <li>Quick access</li> <li>Desktop</li> </ul>	📕 Camtasia	g	9/5/2019 10:24 AM	File folder	
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🖊 Downloads 🛛 🖈	📕 iChannelDesk	$\odot$	8/7/2019 11:43 AM	File folder	
🗎 Documents 🛛 🖈 😽	New Folder	$\odot$	7/16/2019 8:35 AM	File folder	
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# **iCHANNEL**



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### 뇌 How to use iChannelDesk Sync

**iChannelDesk Sync** allows users to manage their Contacts in Outlook and provide you with one centralized database. The synchronization allows you to add contacts from Outlook to iChannel and vice versa. Contacts are matched up so that only your business contacts are synced. Once the contacts are in Outlook, they can also be synced to your chose mobile device.

By default, the syncing is always FROM iChannel DOWN to your Outlook. The exceptions to this rule are those contacts which are defined as YOUR contacts in iChannel by the **Responsible1** or **Responsible2** fields on the Contact record. For those contacts, iChannel will do a **BI-DIRECTIONAL** sync based on which record was updated last.

The iChannelDesk Calendar Sync has been updated. Now if you delete an entry in Outlook, it will be deleted from iChannel during a bi-directional sync. Only items that have never been added to Outlook will be created.

### Steps for How to use iChannel Sync

Step Action

#### First Time Setup of iChannel Sync

There are several steps that should be done to configure iChannel Sync. iChannelDesk provide to options to setup sync:

- Manual iChannel Sync
- iChannel Prompt Wizard

Designate Personal Contacts - once a contact in Outlook is identified as Personal, iChannelDesk will 1 ignore these going forward. ۵ 🗖 i Open 📙 Save 🔫 Rout 🛛 🎎 Sync iChannel Synchronizer Open iChannelDesk and click the Sync icon. The Bi-directionally synchronize iChannel Contacts for which you are responsible. All other iChannel Contacts should be pulled from iChannel into your Outlook. iChannel Synchronizer box will display. Sync Outlook Contacts Perform Syn Add these contacts to Outlook from this iChannel sync list Outlook *Click* the Match Wizard button. The Contact Sync Outlook Contact Folder Contacts Wizard window displays. Match wizard... Already matched... Note: Window will Ji Last time contacts were synced: N/A Set Exit Reset last sync date: Wednesday, June 12, 2019 Sync Outlook Calendar Sync Emails

2

# iCHANNEL



*Identity* the **personal names** and *select* those by **checking the box**.

Then *click* the **Make Personal** button.

 Once designated as personal, the name will no longer appear in this box. You do not have to complete this process all at



once, you may stop at any time and resume later.

**Technical Note:** In Outlook, "User Field 4" stores the sync status of the contact. If personal, the world "PERSONAL" is store in this field. If matched with an iChannel Contact, an iChannel ID is stored. If there is no value in this field, we consider the contact as "Unmatched" and the name will display in the From your Outlook list and "nag" you during the sync process to match it.

Keep the **Contact Sync Wizard** screen open and continue to the next step.

**Match Outlook contacts to those in iChannel** - now the list of names in your Contact Sync Wizard should be considerably smaller. At this time, you will need to search to see if each remaining contact can be matched with a contact in iChannel. We understand this may take a while, however it's a one-time process. Again, you may stop at any time and resume later.

Choose a name by *clicking* the **check box**. You can only choose one name at a time for this process.

-	nt to Search, Match, or Make Personal:		
Last Name	First Name	Company Name	Email
Appleseed	Johnny		jappleseed5544@mail.co
<	Note Remark	1	
Search in iChannel	Make Personal Add to iChannel	1	
Search in iChannel	Make Personal Add to iChannel	Company Name	Emal

Click the Search in iChannel button. iChannel will search the entire contact database to try to



locate a match. The From iChannel box will display any matching contacts based on the names, email address, etc. The possible matches will display in the bottom **From iChannel** box. If iChannel thinks there is an exact match, it will automatically be selected, if not you will need to select one from the possible matching contacts. When the match is found, *click* the **Perform Match** button at the lower left. This will link your Outlook contact with the iChannel contact. Continue matching each contact listed in the From your Outlook area. If the contact cannot be matched to any existing contact in iChannel, continue to the next step to add it to iChannel. 3 Add contacts from Outlook to iChannel - after you have determined the contact cannot be matched to any existing contact in iChannel, you can add it immediately. Contact Sync Wizard From your Outlook Refresh ect the items that you want to Search, Match, or Make Persona Last Name First Name Company Name Email Appleseed Johnny d5544@ Search in iChannel Make Personal Add to iChannel From iChannel Last Name First Name Company Name Emai Auto Match Ext Perform match Select the contact name in the From your Outlook area. *Click* the **Add to iChannel** button. The **Add Contact To iChannel** box will open. (1) Type an Entity name in the Name field and click Search. (2) Choose the Entity from the resulting list. If the Entity does not exist, you cannot add the contact now. The Entity will need to be created in iChannel first. (3) Review the existing contacts and confirm the contact does not already exist. (4) Click the checkbox for that contact. Click the Add button. You will get a confirmation message, click OK. You will return to the Contact Sync Wizard, which you can close at this time.

## **iCHANNEL**

	Name	Bean				Search	
	Entity Type	(AI)			~	2 results found	
	City			State 2	3p		
	Name		Entity Type	City		Rate Zip	
	Bean's Sock	ks letworks, LLC	Testing	Apharetta West Palm Be		GA 30005 FL 33401	- (2)
							- I
	Existing Contr	acts - Click on the Entity r	name above to display a	associated contacts.	3	Y	
	First Name	Last Name	Phone	Email	Clert Name		
	Adde	Davis			Bean's Socks		
	Amanda John	Davis JimmyJohn		amanda.davis@c	Bean's Socks Bean's Socks		
	LouLou	Leomon		loulou@myemaila			
	Adde	Davis		amandazdavis@		(Root)	
	Amanda	Davis		amanda.davis@c			
	Dee	Lowney	(770) 849-0508	dowrey@conarc	Conarc, Inc-Main (	(Root)	
	Lastnan Appleser		Firstname Johnny	Responsible Company	Work Phone	Mobile Phone	City
	4						
						Add	Cancel
	_				_	_	1.1
Adding Contacts f	rom i	Channel to	your Outlo	ok - within i	Channel,	you can s	specify the co
you want sync'd	with C	Jutlook. Thi	is is done v	ia the <b>Perso</b>	onal List	called "O	<b>)utlook</b> ." Plea
iChannel User Gui	de for	instruction	s on how to	set this up.			
					contacto	to Outloo	
Once your list has	been	saveu, you	are ready t	o add those (	contacts		лк.
	ook ar	nd <b>iChannel</b>	Desk.				
Open Outl							

drop-down list to choose from.

Add these contacts to Outlook from this iChannel sync list:          Outlook Contact Folder       Contacts         Match wizard       Already matched         Note:       Window will disappear during analysis
Outlook Contact Folder Contacts
Last time contacts were synced: 4/7/2017 Set Exit
Sync Outlook Calendar

Select the items that you wa	ant to Search, Match, or Make Personal:		Refresh
Last Name	First Name	Company Name	Email
	ichannel		ichannel@isgusa.com
Aylor	Gina		
Black	Kristina		
Brooks	Connie		
Brown	oL		
Campbell	Krissy		
<			
From iChannel			
Last Name	First Name	Company Name	Email
Black	Kristina		
Black	Euclid		
BLACK	CATHERINE		
Black	Lorie		
Black	Joe		
<			

- You may continue to work on the unmatched contacts or skip this step by *clicking* the **Proceed** with Sync button. The iChannel Contact Synchronizer will run and display a status bar at the bottom of the box.
- When the sync occurs, the base contact information is synched such as name, company, address, phone(s), and email.
- When the sync is complete, a confirmation box will display the contacts that were updated in iChannel.
- *Click* **OK**. The box will close; the Synchronizer will continue to display and can be closed, too.

	Pulled down from iChannel -> your Ou	utlook
Name	Entity	Last_Update
Johnny Appleseed	Bean's Socks	4/7/2017 amanda.davis_outlook
Linda Lemon	Apple Test Entity	
Calendar items touched: 0	Task items touched: 0	
	Sent up from your Outlook -> iChan	nel

#### **Viewing My Matched Contacts**

From the iChannel Contact Synchronizer, *click* on the **Already Matched** button to look at the contacts you are synchronizing between iChannel and Outlook. This grid can be easily re-arranged by clicking on the column name and dragging it into the header.

							- 0
Matched Contacts Drag a column header here to group by that column.							
<ul> <li>Appleseed</li> </ul>	Johnny	Bean's Socks					
٢							

#### Daily use of iChannelDesk Sync

You can either manually (Step 4 above) OR automatically sync all the matched contacts. The settings for automatic syncing are on the iChannelDesk Settings screen. You can choose to Auto-Sync on Startup or Auto-sync on Exit of iChannelDesk.

sync?	
Add these contacts to Outlook from this iChannel sync list: Outlook	~
Outlook Contact Folder: Contacts	~
From iChannel To Outlook     Process     10     days back to     60     days forward     BDirectional      Display Entities associated with the senders email address or domain	
Process 2 days back 🚯 Manage email sync	rules
to-Sync to run?	
Delay at Startup: 2 0 minutes	
Every 2 thours between 7.00 AM A and 5:00 PM A	
	Add these contacts to Outlook from this iChannel sync list: Outlook Outlook Contact Folder: Contacts



You can now manually sync during auto sync wait. No matter what you are syncing, new functionality verifies that a manual Sync is not active when initiating the Auto-Sync process; if it is, the Auto-Sync is abandoned. The Sync Button is disabled during the Auto-Sync process and enabled when it is finished.

### How to Perform a Quick Search

iChannelDesk can perform a quick entity (client) or contact search using the Quick Search feature on the iChannelDesk toolbar.



- 1. If you are logged into iChannel, *click* the **Folder** link will reload the browser window to the File Area of the Entity selected.
- 2. *Click* Email icon will reload the browser to the Entity's Email area.

*Click* **Clipboard** icon will copy the Name and Address to the clipboard.

### 뇌 How to View My Activities

iChannelDesk provides a quick and easy feature for users to access and view their Activities (tasks).



## SiChannelDesk Support

If you are experiencing any issues with working with iChannelDesk, users can *access* **Settings > Support** tab to create a support ticket that submit the ticket request to iChannel Support Team. The Support tab also has links to various configuration files and a link to *Export Trace Log to Desktop that that the iChannel Administrator* can use to trouble shooting your issues.

iChannelDesk - Support		×
Settings Sync History Support About		
	Config files	<u>Go to Support Suite</u>
○ I do	you can email your trace file (and config files) to iChannel Support not have a support ticket and do not need one created te new support ticket O I have an existing ticket Ticket #:	
Notes (optio	nal): Send	
	View trace file to Desktop	Re-register Redemption
Changes may require	a program restart. OK Cancel	Revert Apply