














How to Configure Client Access iChannel Portal (Subscriber)

IC-800



- iChannel Portal – Subscriber Record 3
 - Welcome to iChannel Portal Training: How to Configure Client Access for iChannel Portal: Subscriber Record..... 3
 -  Step 1: How to Create a Contact 4
 -  Step 2: How to Create a Subscriber and Assign to iChannel Portal..... 6
 -  How to Add a Subscriber to Multiple iChannel Portals 10
 -  How to Edit iChannel Portal Assignments 11
 -  How to Send iChannel Portal is Ready Email to Clients..... 13
 -  How to Make a Subscriber Inactive 14
 -  How to Publish File(s) to the iChannel Portal..... 15
 -  How to Unpublish File(s) from the Portal..... 17
 -  How to Accept File(s) Submitted by Clients 18
 -  How to Reset a Subscriber Password 20
 -  How to Access iChannel Portal (Clients) from iChannel..... 21

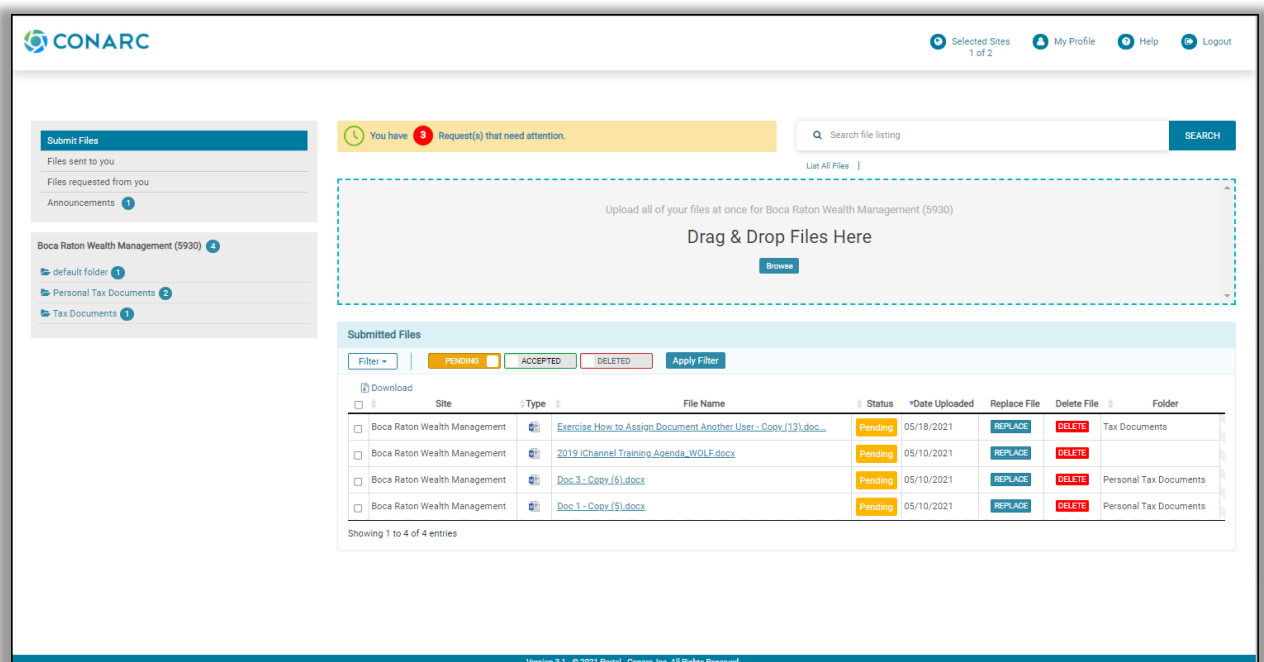


iChannel Portal – Subscriber Record

Welcome to iChannel Portal Training: How to Configure Client Access for iChannel Portal: Subscriber Record

iChannel Portal offers a secure location for your clients to access their Files, collaborate with others, upload their file(s) and give access to those file(s) to other service providers. When your clients log into the Portal, your clients have 24 x 7 access to their data. Clients no longer must wait for copies and revisions to be mailed back and forth.

iChannel Portal provides a *multi-level security* approach on clients file(s) available to be viewed, downloaded, or uploaded to a secure Primary | Secondary category hierarchy structure when working with file(s) that are shared on the Portal.



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

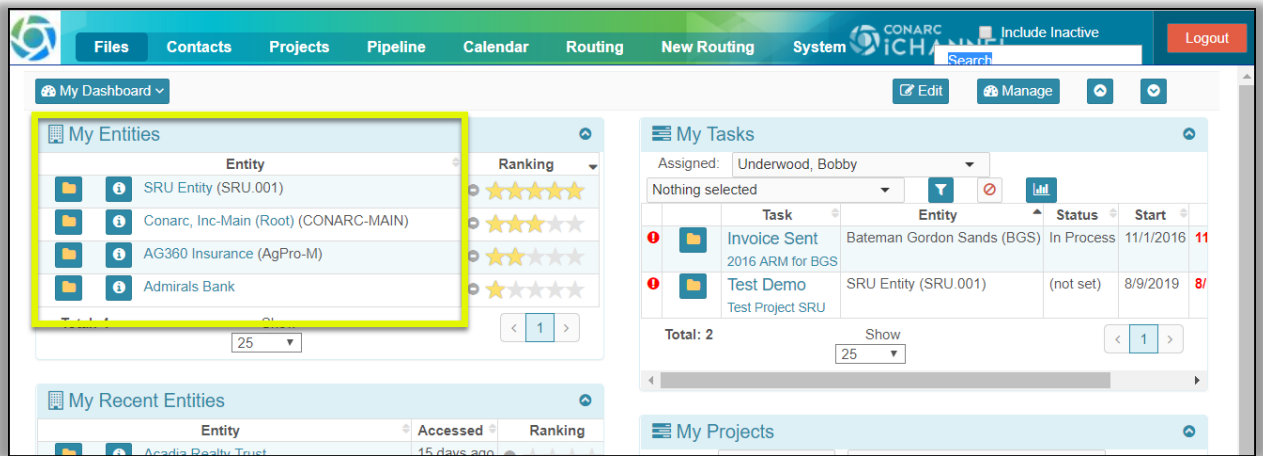
If you feel you should have access to any feature, please contact your IT System Administrator.

This guide will provide *step-by-step actions* on how to provide access to iChannel Portal for your clients. Several steps may be automated by your Organization | IT System Administrator (i.e. Contacts | Subscribers might be migrated into iChannel via an application interface file); therefore, you might not need to complete all steps. Please *contact* your **IT System Administrator** for additional information on rather your Organization has automated some of the steps.

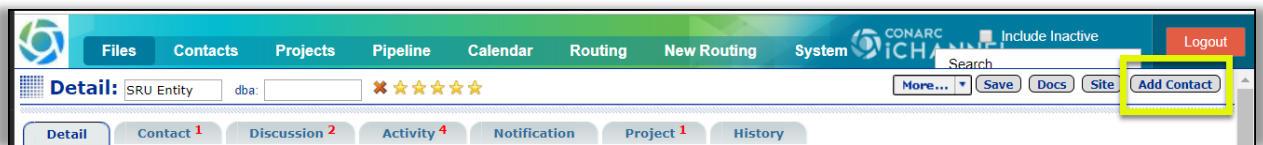
Step 1: How to Create a Contact

Steps for How to Create a Contact

- | Step | Action |
|------|---|
| 1 | <p>From the Dashboard, access a Site, <i>double-click</i> the Site Name to access the Clients CRM where you would like to <i>create</i> the Contact.</p> <ul style="list-style-type: none"> To quickly access the Site in iChannel, <i>click</i> on the Site Name when you want to go to the iChannel CRM module for that Site. |



- | | |
|---|--|
| 2 | <p>Click Add Contact.</p> <ul style="list-style-type: none"> If the Add Contact button is <i>not visible</i>, please contact your System Administrator to grant permission to add contacts. |
|---|--|



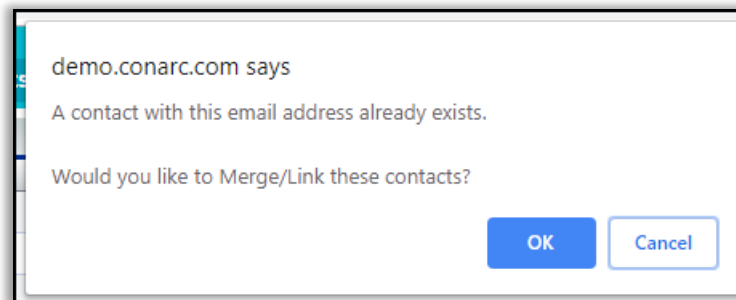
The **Add Contact...[Site Name...]** window display.

3

Enter the email address for the Contact in the **Email** field.
 Enter the contacts first name in the **First Name** field.
 Enter the contacts last name in the **Last Name** field.

Next, *click Tab* to expose the remaining fields; then *click Save*.

If the email address is already in iChannel, once the email is entered in the Email field, iChannel will perform a search to verify the email address. If the email address already exists, the below message will display. *Search* for the **Contact** instead.



Step 2: How to Create a Subscriber and Assign to iChannel Portal

Steps for How to Create a Subscriber and Assign to iChannel Portal

Step	Action
------	--------

1

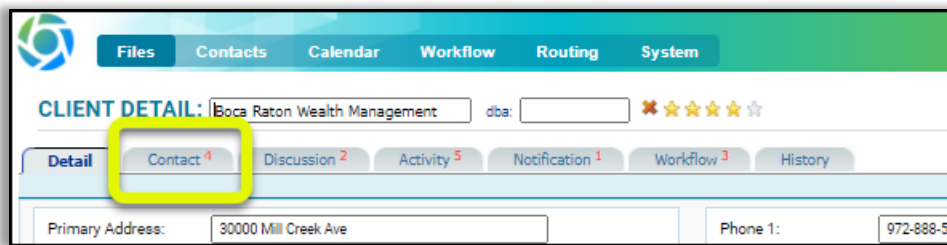
From the **Dashboard**, access a Site, *double-click* the **Site Name** to access the **Clients CRM** where you would like to create the Contact.

- To quickly access the Site in iChannel, *click* on the **Site Name** when you want to go to the CRM module for that Site.



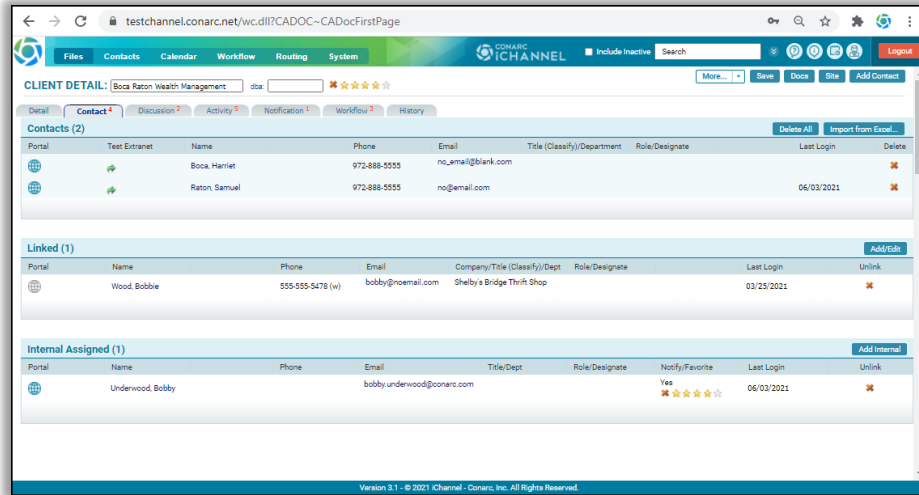
2

Click **Contact** tab.

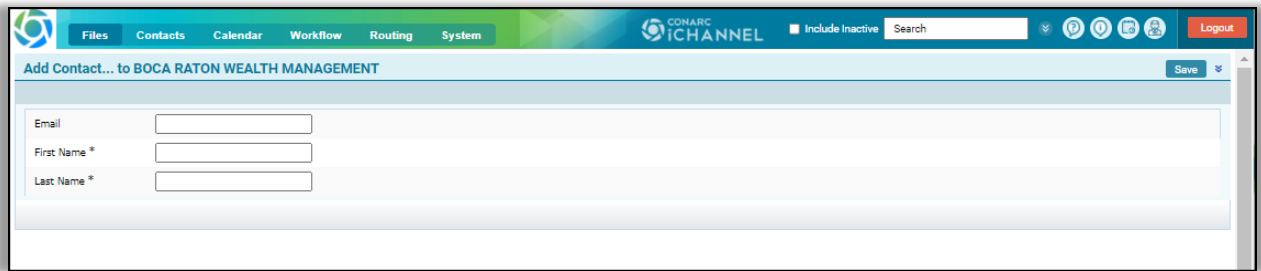


The **Contact** detail page displays.



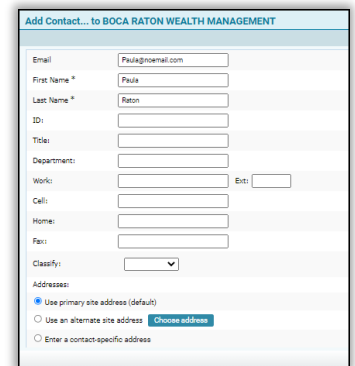


To add a contact, click the **Add Contact** button. The **Add Contact** page will display.

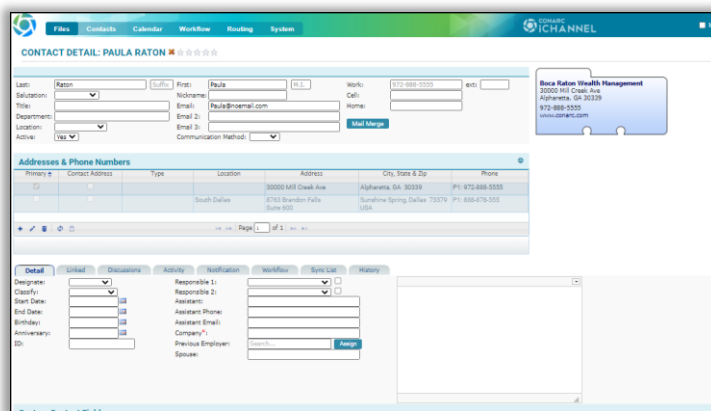


There are **three (3) required fields** to add a new Contact to a Site.

1. **Email** – a unique email address for the new contact.
2. **First Name** – enter the contact’s first name.
3. **Last Name** – enter the contact’s last name.
 - a. **TIP:** after you enter the last name, click the Tab button on your keyboard to open additional fields when creating a new contact.
4. **Click Save.**



The new contact will be created at the Site.



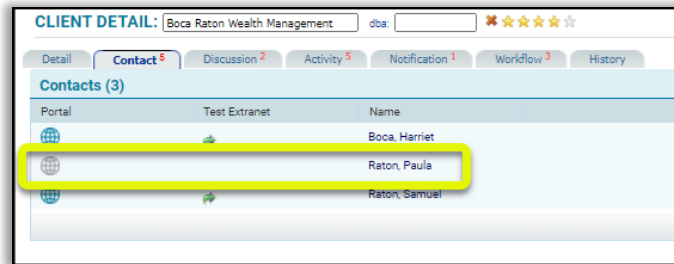
3

After creating a Contact record, the next step is to **create the Subscriber record**. A Subscriber is a record that allows your Clients to have access to the iChannel Portal to upload files, send requested files, to name a few features.

A Subscriber record is “required” for clients to have access to the iChannel Portal.

On the new contact detail page, *click* the button.

You can also create a new Subscriber record (access to the iChannel Portal) by access the Contacts tab from the Client Details page. If a Contact currently does not have access to iChannel Portal, a “gray globe ” icon will display. The gray globe is also an indicator the Contact *does not* have a Subscriber record.



Click the “gray globe ” or *click* the button to create the subscriber record. The **Create New Portal Subscriber** page displays.

The **Email** and **User Id** fields will *pre-populate* with the contacts information. It’s recommended to not update these fields.

In the **Password** field, *enter* a **password** for the Subscriber to access the Portal. In the **Confirm Password** field, *re-enter* the **password**.

Click . The **Subscriber Details** page will display. The Subscriber record is now created.





After the Subscriber record has been created. Next, set the security for the Subscriber (Group Membership).

4

In the **Group Membership** section, *select the checkbox(es)* to assign the Subscriber to a **Group**. Group Membership set the security for the client when they access the iChannel Portal.

Click Save.

Verify the **Subscriber** is assigned to the Portal and to Security Groups:



How to Add a Subscriber to Multiple iChannel Portals

Steps for How to Add a Subscriber to Multiple iChannel Portals

Step	Action
------	--------

1

Locate a **Subscriber** and access the **System >> Subscriber Details** window, *navigate* to the **Portal Assignment** section.

SYSTEM - Subscriber Details

Last Name: Raton
 First Name: Paula
 User ID: Paula@noemail.com
 Email: Paula@noemail.com
 Phone:
[Reset Password](#) [Adv. Settings](#)
[Email Notification](#)
[Send Portal Is Ready Email](#)

Site Name: Boca Raton Wealth Management
 Site Code: 10681
 Active:
 Administrator: No
 Multiple Login: Yes

Created: 06/03/2021 11:51 AM by bobby.underwood
 Modified: 06/03/2021 11:54 AM by bobby.underwood
 Agreed to Terms:
 Last Login: 01/01/1900 12:00 AM (History)

Email Signature:
 Group Membership:
 Member: Admin User
 Tax Return Only
 Client Basic User
 Tax Group

Paula Raton is a member of the following sites:

Site Code	Site Name	Security Groups (Portal)
10681	Boca Raton Wealth Management Boca Raton Wealth Management	Client-Tax Return Only Tax Group

2

In the **Search by Site Name (Client ID)** field, *search* for the additional **Entities** to assign the Subscriber then *click* [Go](#).

Paula Raton is a member of the following sites:

Search by Site Name or Site ID: [Go](#) Or Find Sites Matching: Or

10681	Boca Raton Wealth Management Boca Raton Wealth Management
-------	--

The **Add Subsites to Subscriber** window displays. *Check* the **checkbox** for the additional **Subsites** to add to the subscriber.

CLIENT DETAIL: Boca Raton Wealth Management dba: ★ ★ ★ ★ ★

Detail [Contact](#) ⁵ [Discussion](#) ² [Activity](#) ⁵ [Notification](#) ¹ [Workflow](#) ³ [History](#)

ADD SUBSITES TO SUBSCRIBER

Raton, Paula [Save](#)

Grant Access	Subsite Name & Code	Grant Access	Subsite Name & Code
<input checked="" type="checkbox"/>	Shelby's Bridge Thrift Shop 10534		

Click [Save](#).

The additional Portal is now assigned to the Subscriber.



NOTE: By default, when adding additional sites to a Subscriber's profile, Security Groups will automatically be assigned to the new Site based on the Security Groups from the Primary Site.

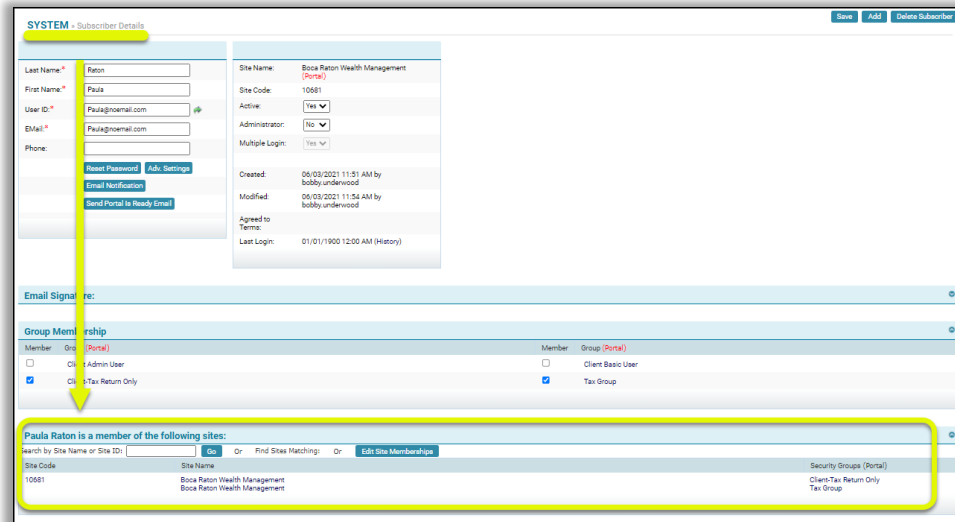
How to Edit iChannel Portal Assignments

Steps for How Edit iChannel Portal Assignments

Step Action

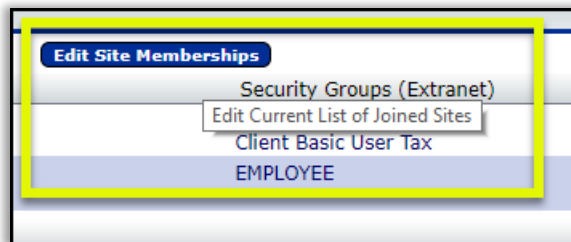
1

Locate a **Subscriber** and access the **System >> Subscriber Details** window, navigate to the **Portal Assignment** section.



2

Click **Edit Site Memberships**



The **Add Subsites to Subscriber** window displays. *Deselect* the **checkbox** for the **additional Subsites** added to the subscriber.

The screenshot shows a software interface for managing a subscriber. At the top, it displays 'CLIENT DETAIL: Boca Raton Wealth Management' with a 'dba:' field and a star rating. Below this is a navigation bar with tabs for 'Detail', 'Contact 5', 'Discussion 2', 'Activity 5', 'Notification 1', 'Workflow 3', and 'History'. The main section is titled 'ADD SUBSITES TO SUBSCRIBER' and features a 'Save' button in the top right corner. Underneath, the name 'Raton, Paula' is displayed. A table lists subsites with columns for 'Grant Access', 'Subsite Name & Code', and 'Grant Access'. The first row shows a checked checkbox, 'Native Site: Boca Raton Wealth Management 10681', and a checked checkbox. The second row shows an unchecked checkbox, 'Shelby's Bridge Thrift Shop 10534', and an unchecked checkbox. Below the table are 'Select All' and 'Un-Select All' options.

Grant Access	Subsite Name & Code	Grant Access	Subsite Name & Code
<input checked="" type="checkbox"/>	Native Site: Boca Raton Wealth Management 10681	<input checked="" type="checkbox"/>	Shelby's Bridge Thrift Shop 10534

Click . The additional **iChannel Portal (Subsites)** are now removed.



How to Send iChannel Portal is Ready Email to Clients

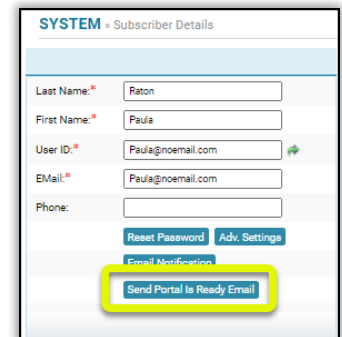
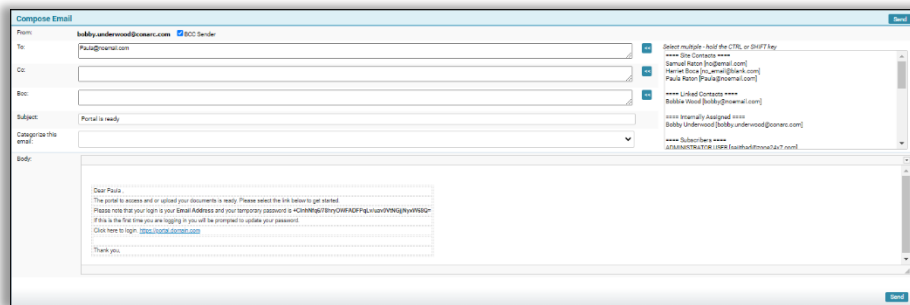
Steps for How to Send iChannel Portal is Ready Email to Clients

Step	Action
------	--------

1

Access the **System >> Subscriber Details** page; click on a **Subscriber**, on the detail page, click .

The **Compose Email** page displays

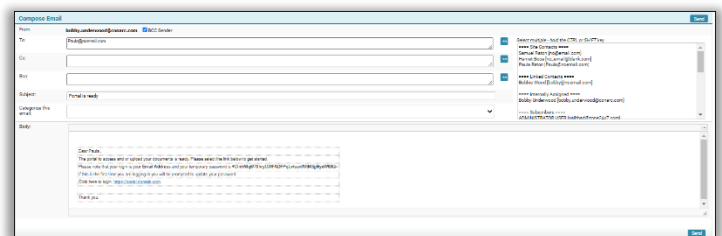


2

Compose Email

- **From:** - by *default* your **email address** will display.
- **BCC Sender:** - by *default*, this checkbox is **checked**.
 - Since iChannel will be using your Organization email system, iChannel does not store a copy of the email in your Sent folder. Instead, iChannel will BCC you a copy of the email.
- **CC: | Bcc (optional):** - add additional contacts from the **Client Contacts** list.
- **Subject:** - by *default*, iChannel will **pre-populate** with “Portal is Ready”. This text can be modified.
- **Categorize this email (Optional)** – to categorize your email, *select* a **Category** from the drop-down list.
- **Body:** - by *default*, iChannel will add the subject text “**Your Portal is Ready. Click this link to login.**” To add additional text, enter below the default message.

Click



How to Make a Subscriber Inactive

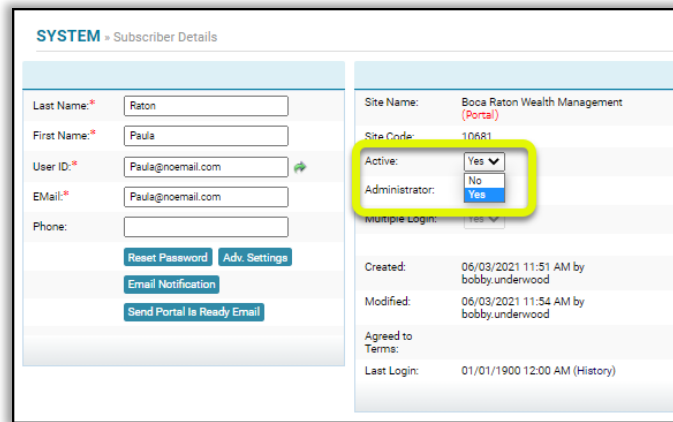
Steps for How to Make a Subscriber Inactive

Step	Action
------	--------

1

Locate a **Subscriber** and access the **Subscriber Details** window, locate the **Active** field.

- **Active (Yes)** – the Subscriber is Active and has access to the Portal
- **Inactive (No)** – the Subscriber is Inactive and doesn't have access to the Portal



SYSTEM » Subscriber Details

Last Name:*	Raton	Site Name:	Boca Raton Wealth Management (Portal)
First Name:*	Paula	Site Code:	10681
User ID:*	Paula@noemail.com	Active:	Yes
EMail:*	Paula@noemail.com	Administrator:	No
Phone:		Multiple Login:	Yes
	Reset Password Adv. Settings	Created:	06/03/2021 11:51 AM by bobby.underwood
	Email Notification	Modified:	06/03/2021 11:54 AM by bobby.underwood
	Send Portal Is Ready Email	Agreed to Terms:	
		Last Login:	01/01/1900 12:00 AM (History)

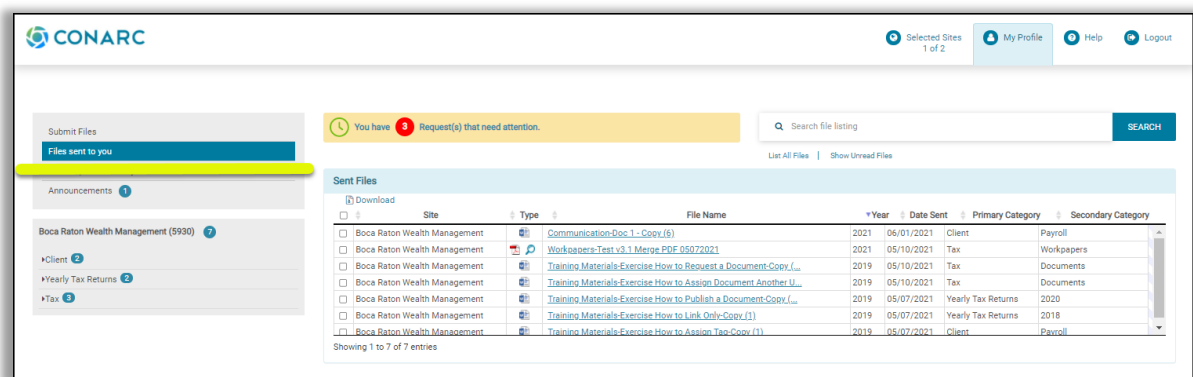
Click [Send](#).

How to Publish File(s) to the iChannel Portal

When you are ready to share files with your clients access the File Area for that client. Select a file or files, *click* the **Gear icon**, and *select* **Publish** only from the drop-down list.

Published files will appear in the client portal in the **Files Sent to You** area on the navigation panel.

Your iChannel Representative will send File(s) from iChannel to the iChannel Portal. File(s) shared for clients to download will appear in the **Files Sent to You** section.

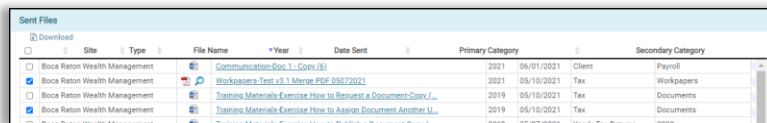


From the Files Sent to You section you can:

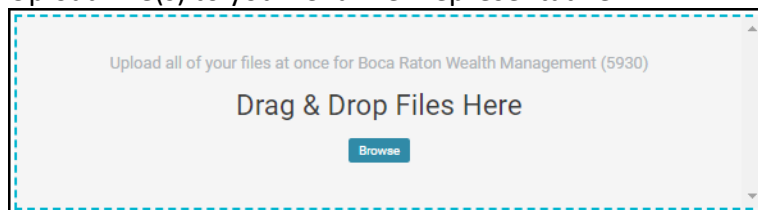
- Filter your iChannel Portal Shared Files section
- Search for File(s) & List all Files



- Show Unread Files
- View all File(s) shared by your iChannel Firm Representative



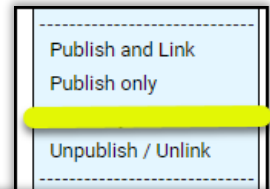
- Upload File(s) to your iChannel Representative



Gear Icon – How to Publish File(s) to the iChannel Portal

Step	Action
------	--------

1	<p>Select a file(s) from the File Listing Area. <i>Hover</i> over the Gear icon, the action list will display. <i>Click</i> Publish Only.</p>
---	--



The **Publish and Link** window will display.

- **Title** – the file(s) names will display.
- **Expiration Date (Optional)** – this *optional field* allows you to set an expiration date. This date determines how long the Published file is available on the Portal.
- **Notification:** - to send a notification to the Portal, *check* the checkbox **Send Extranet Notification Now**.
- **Extranet Channel | Topics** – To publish the file(s), *select* all **Topic | Subtopics** that apply.

Click .

The Files have been published/linked. message will display.

Published File(s) – Icon

- After a file(s) has been Published, in the File Area a new icon will appear for published file(s).

<input type="checkbox"/>		Type	Year	Title	Size	Secondary Category	Modified	Created By	Created	Links	Print
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train

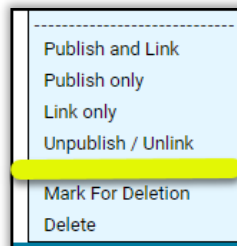


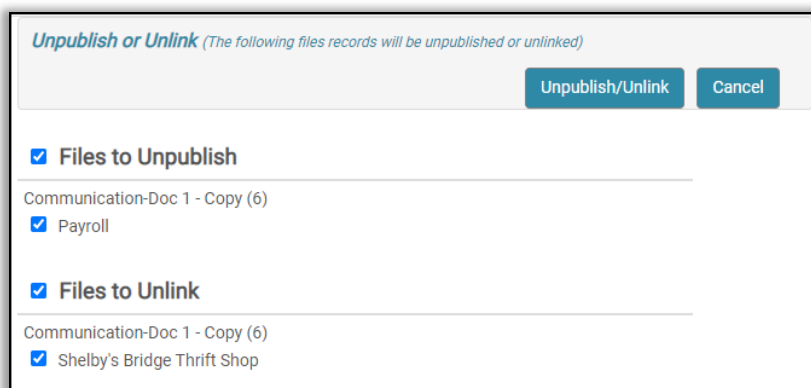
How to Unpublish File(s) from the Portal

Gear Icon – How to Unpublish File(s) from the Portal

Step	Action
------	--------

1	<p>Select a file(s) that has the icon from the Entity File Area. Hover over the Gear icon, the action list will display. Click Unpublish / Unlink.</p> <p>The Unpublish or Unlink window will display.</p> <ul style="list-style-type: none"> • Files to Unpublish – by <i>default</i>, this checkbox is checked. A list of file(s) will be listed below. <ul style="list-style-type: none"> ○ Topic – the topic the file(s) were assigned will display, by <i>default</i> the checkbox will be checked. • Files to Unlink – by <i>default</i>, this checkbox is checked. If no file(s) have been linked, the message “<i>There are no file(s) to unlink</i>” will display. <p>Click .</p> <p>The</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Unpublish or Unlink (The following files records will be unpublished or unlinked)</p> <div style="text-align: right;"> Unpublish/Unlink Cancel </div> <hr/> <p><input checked="" type="checkbox"/> Files to Unpublish</p> <p>Communication-Doc 1 - Copy (6)</p> <p><input checked="" type="checkbox"/> Payroll</p> <hr/> <p><input checked="" type="checkbox"/> Files to Unlink</p> <p>Communication-Doc 1 - Copy (6)</p> <p><input checked="" type="checkbox"/> Shelby's Bridge Thrift Shop</p> </div>
---	---





Files have been published/linked.

message will display.

How to Accept File(s) Submitted by Clients

Gear Icon – How to Publish File(s) to the Portal

Step	Action
------	--------

1	<p>Select a Site, access the Site File Area.</p> <p>If the Site has any submitted files by a client from the iChannel Portal, the File(s) will appear in the highlighted yellow section called Submitted Files.</p>  <p>Check the checkbox for all File(s) you wish to Accept. Additional actions are:</p> <ul style="list-style-type: none"> • Copy to Zip • Email • Delete <p>The Accept File(s) window displays.</p> <ul style="list-style-type: none"> • Site – <i>by default</i>, the Site for the Submitted Files will display. <ul style="list-style-type: none"> ○ To update – <i>click</i> in the Site field and do a new Site search. • Type Title: - <i>by default</i>, the checkbox to accept the File Type Title will populate. <ul style="list-style-type: none"> ○ If the accepted File(s) title needs to be appended, <i>click</i> in the field, and make any necessary changes. <p>Change Properties section</p> <ul style="list-style-type: none"> • Category – all File(s) that reside in iChannel <i>must be assigned</i> to a Category (Primary
---	--

Year / Category	Title	Size	Delete	Created By	Last User	Modified
2021 Tax Documents	Exercise How to Assign Document Another User - Copy (13).docx	12 k		Samuel		05/18/2021 3:07 PM
2021 Personal Tax Documents	Doc 1 - Copy (5).docx	12 k		Samuel		05/10/2021 1:37 PM
2021 Personal Tax Documents	Doc 3 - Copy (6).docx	12 k		Samuel		05/10/2021 12:30 PM
2021	2019 iChannel Training Agenda_WOLF.docx	175 k		Samuel		05/10/2021 10:40 AM

- **Copy to Zip**
- **Email**
- **Delete**

Year	Title
2021	Exercise How to Assign Document Another User - Copy (13).docx
2021	Doc 1 - Copy (5).docx
2021	Doc 3 - Copy (6).docx
2021	2019 iChannel Training Agenda_WOLF.docx

- **Site** – *by default*, the Site for the Submitted Files will display.
 - **To update** – *click* in the Site field and do a **new Site search**.
- **Type | Title:** - *by default*, the checkbox to accept the File **Type | Title** will populate.
 - If the accepted File(s) title needs to be appended, *click* in the field, and **make any necessary changes**.

Accept File(s)

Check files (either individually or in groups) and choose their properties in the **Change Properties** section below. You must uncheck files that have different properties.

Click **Accept** to process the checked files. Unchecked files will remain listed until their properties are assigned.

Repeat until all files are processed.

Site: Boca Raton Wealth Management

Type	Title
<input checked="" type="checkbox"/>	Exercise How to Assign Document Another User - Copy (13)

Change Properties
Select the properties to apply to the files checked above.

Category:

Primary Category: Administrative
Secondary Category: Billing

Target Subfolder: ..\Administrative\billing\

Create new Target Subfolder: (optional)

Publish to Portal:

Permanent:

Year: 2021

Use Standard File Naming:

File Status: Normal

File Tags: Training, Training Docs, Communication, Workflow/Opportunity

Process files in the background. I understand the files may not immediately appear in the listing. Uncheck if you prefer to wait until all files have been processed.

Send me an email when all files have been processed.

Accept

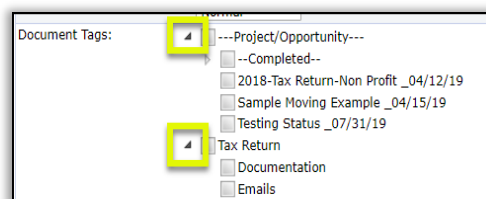
- **Category** – all File(s) that reside in iChannel *must be assigned* to a Category (Primary |



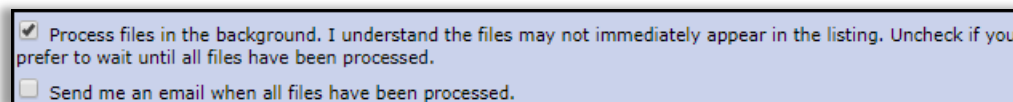
Secondary).

- **Target Subfolder (Optional)** – *click* the **drop-down arrow** to select a Target Subfolder type.
- **Create new Target Subfolder (Optional)**
- **Publish to Portal** – *ignore* this **checkbox** for Accept File(s).
- **Permanent** – if the accepted File(s) need to be marked permanent in the File Area for the Site, *check* the **Permanent checkbox**.
- **Year** – *select* the **Year drop-down** list to assign a year for the accepted File(s).
- **Use Standard File Naming** –
- **File Status** – *select* the **File Status drop-down arrow** to select a status for the File(s).
- **File Tags (Optional)** -

- *Click* the **Project/Opportunity arrow** to expand the available projects to assign the File(s) to a Project.
- *Click* the **Tag arrow** to expand the available tags. *Check* the **appropriate checkbox(es)** to assign the File(s) to a Tag.



- *By default*, the checkbox for **“Process files in the background. I understand the files may not immediately appear in the listing”** is checked.
 - *Uncheck* if you prefer to wait until all files have been processed.
- *Check* **Send me an email when all files have been processed** if you want to receive an email when the File(s) are in the File Area.



- *Click* **Accept**.



How to Reset a Subscriber Password

How to Reset a Subscribers Password

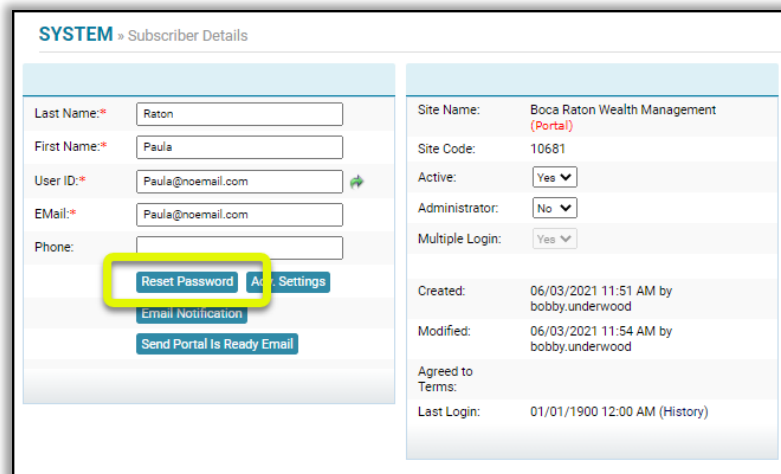
Step	Action
------	--------

1	From the Dashboard , access a Site and <i>double-click</i> the Site Name to access the CRM where you want to create the Subscriber .
----------	---

- To quickly access the **Clients CRM** in iChannel, *click* on the **Site Name**.



Locate a **Subscriber** and access the **System >> Subscriber Details** window, click



The **System >> Change Subscriber Password** page displays.

- Subscriber Name: & User ID:** - display the name and ID of the Subscriber.
- New Password** – *update* the field with a new password.
- Confirm Password** – *confirm* the field with the new password.
- Click

How to Access iChannel Portal (Clients) from iChannel

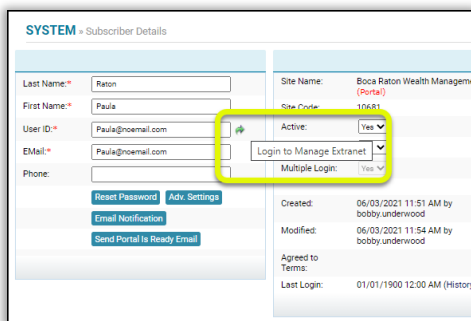
Steps for How to Access iChannel Portal (Clients) from iChannel

Step	Action
------	--------

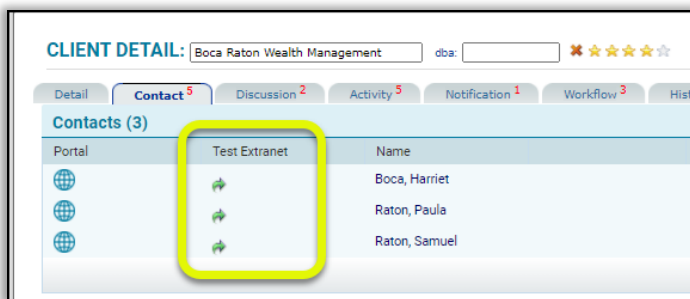
1	iChannel Users can verify that a new iChannel Portal has been created for their clients by logging into the new client portal as the user using the “incognito” feature. The following are locations in iChannel where an iChannel User can use the incognito feature:
---	--

NOTE: Extranet = Portal

SYSTEM >> Subscriber Details page.



Client Detail > Contacts tab.



- To learn more about iChannel Portal, *click*

VIDEO: GET STARTED WITH ICHANNEL video link:

[Getting to Know iChannel Portal](#)

