iCHANNEL

iChannel Academy

Training & Educational Resources
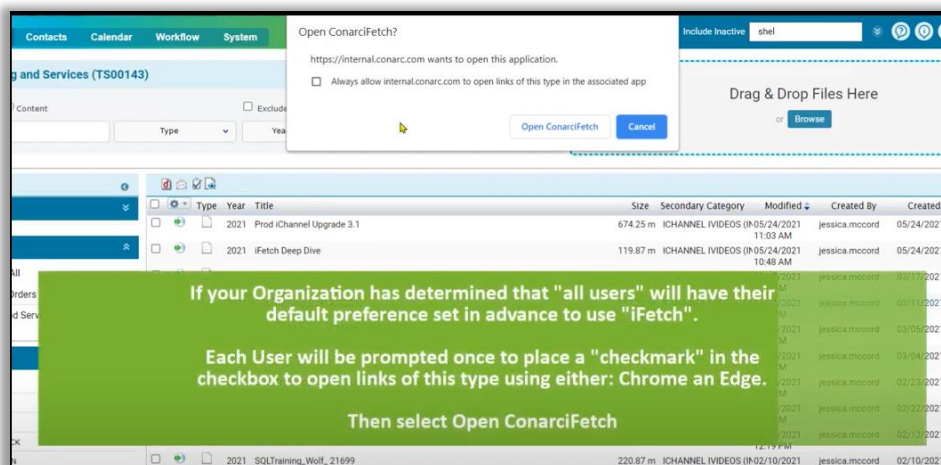
iFetch

iChannelDesk (ICD)

IC-700

iFetch (Direct Mode)

iFetch (Direct Mode)

iFetch is an application that runs in the background and is the default mode for viewing files, or "**Direct Mode**". With iFetch Direct Mode, users can quickly and easily access client files to make any necessary changes to a file(s) without the need to have iChannelDesk (ICD) application running in the background.

By default, all iChannel Clients will have iFetch as their default "direct mode" for viewing, editing, and saving a file. There are additional options which are "only" available at the Administrative level within iChannel.

When determining what configuration to set up for a user, there are three configuration options:

- **User Default iFetch** – by default, all iChannel clients will have iFetch installed as the system wide preference as the default primary tool for managing edits to a client file. User's will be prompted once to accept links to open files in Chrome or Edge.

- **Default iFetch or ICD (iChannelDesk) ADMIN Only** – your Organization has made a system-wide decision to allow each individual user to define their preference by selecting either iFetch or ICD (iChannelDesk) as the default primary tool for managing edits to a client file. User's will be prompted once to accept their preference.
  - **By default, all users will have their system wide preference set to "iFetch" for direct mode.**
  - **This option is only used in rare circumstances and should be reviewed with iChannel Support prior to setting this option.**
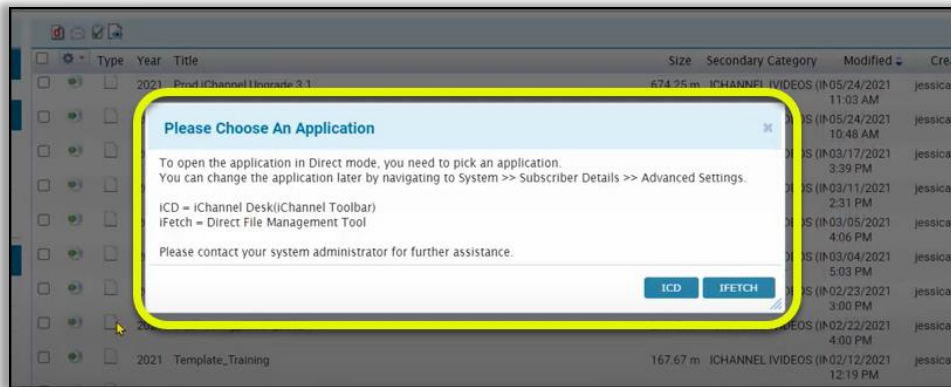
- **Default ICD (iChannelDesk)** – your Organization has made the system-wide decision to set all user preferences to use ICD (iChannelDesk) as the primary tool for managing edits to a client file.
    - **By default, all users will have their system wide preference set to "iFetch" for direct mode.**
    - **This option is only used in rare circumstances and should be reviewed with iChannel Support prior to setting this option.**

Updating a User Preference iFetch or iChannelDesk (ICD)- ADMIN Only feature

1. *Select* **System** from the **iChannel Banner**
2. Under **Quick Links**, *select* the **User Account link**

3. In the **SYSTEM >> Subscriber Details** section, *select* **Adv. Settings.**
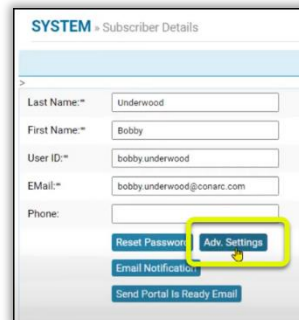
4. On the **SYSTEM >> Advanced Settings** Maintenance: [User Link], there is a *User Preference*: **DIERCTMODEPROGRAM** field. Click the "question mark" icon for an explanation of the acceptable values.
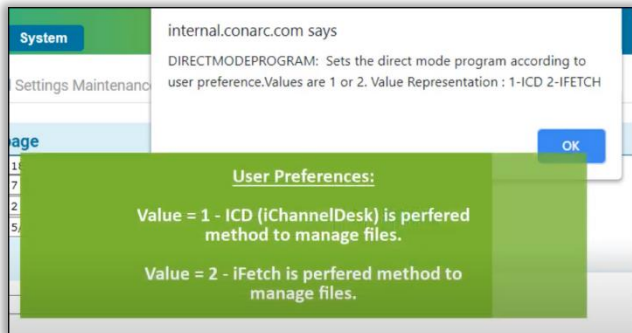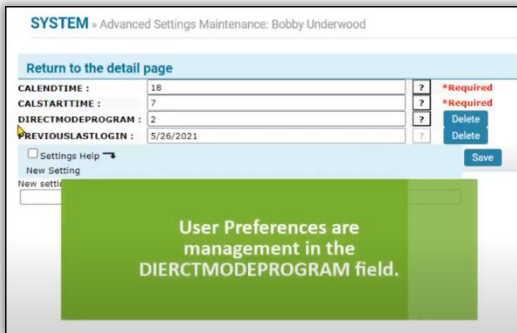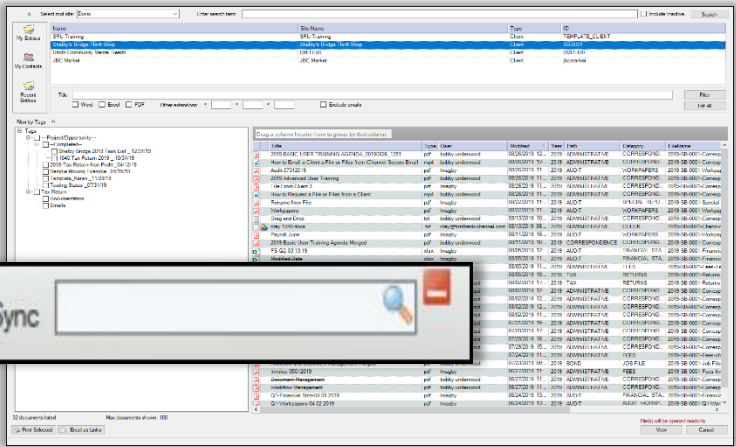
iChannelDesk (ICD)

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

- Open iChannel file(s)
- Save email(s) directly from Outlook (or any email system) directly into iChannel
- Save file(s) directly to iChannel
- Route file(s) directly to iChannel
- Save file(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* for clients to access, download and upload Files using iChannelDesk.
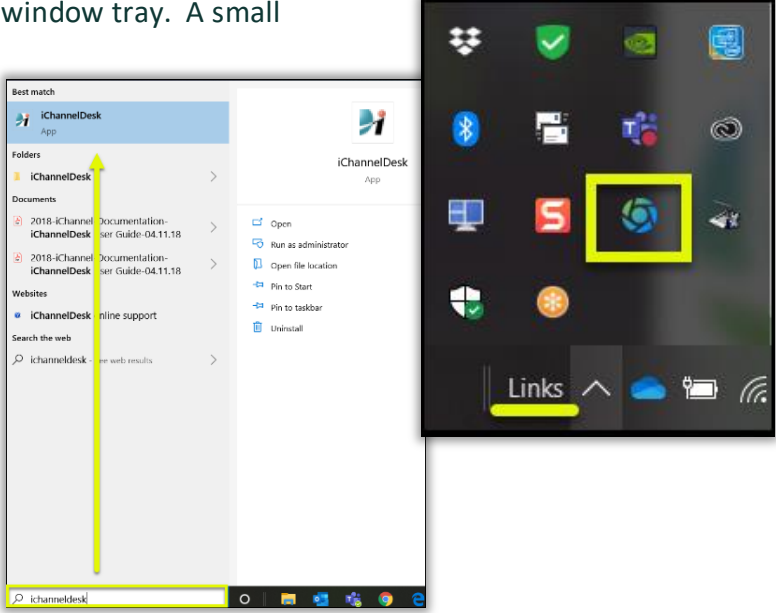
How to Access and Start iChannelDesk

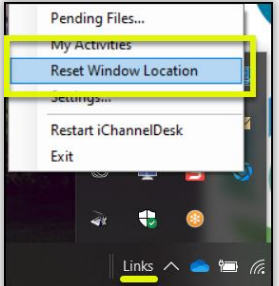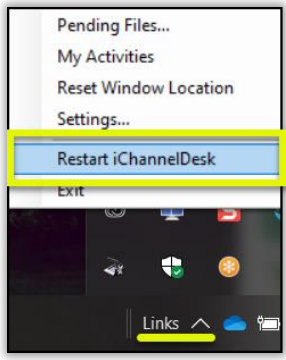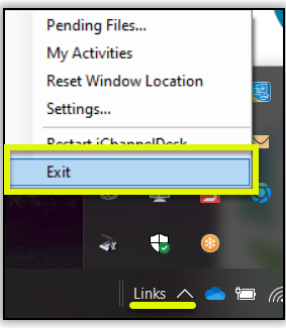| Steps for How to Access and Start iChannelDesk	
Step	**Action**
1	*Click* on the **Links ʌ** icon in your system window tray. A small application window will display; *double-click* the **iChannelDesk** icon. • You can also *search* for iChannelDesk App using the **Windows Search** feature. To *start* **iChannelDesk**, *double-click* the **iChannelDesk** icon. The iChannelDesk Toolbar will display. If you use multiple monitors, your iChannelDesk Toolbar might appear on a different monitor. To locate you iChannelDesk Toolbar, *access* the **Links ʌ** icon from the **Windows System Tray**, *right-click* the **iChannelDesk icon**, *select* **Reset Window Location**.
2	To *move* the **iChannelDesk Toolbar** to a different location on your window: • *Locate* the **gripper bar** on the *left-side* of the iChannelDesk Toolbar window; *click* and *drag* to a location on your desktop.

3	To *re-start* iChannelDesk, *access* the **Links ∧** icon from the **Window System Tray.** *Right-click* the **iChannelDesk icon**, *select* **Restart iChannelDesk**.	
4	To **exit** iChannelDesk, *access* the **Links ∧** icon from the **Windows System Tray.** *Right-click* the **iChannelDesk icon**, *select* **Exit**.	

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 – file(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)
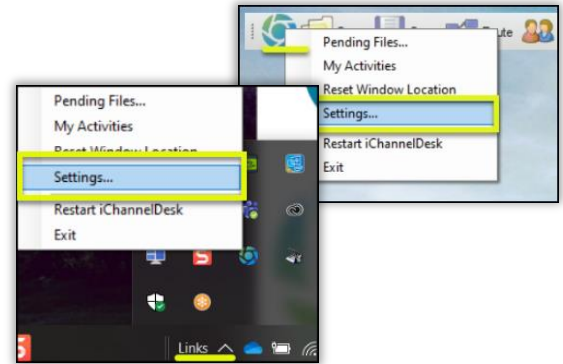- Auto-Sync

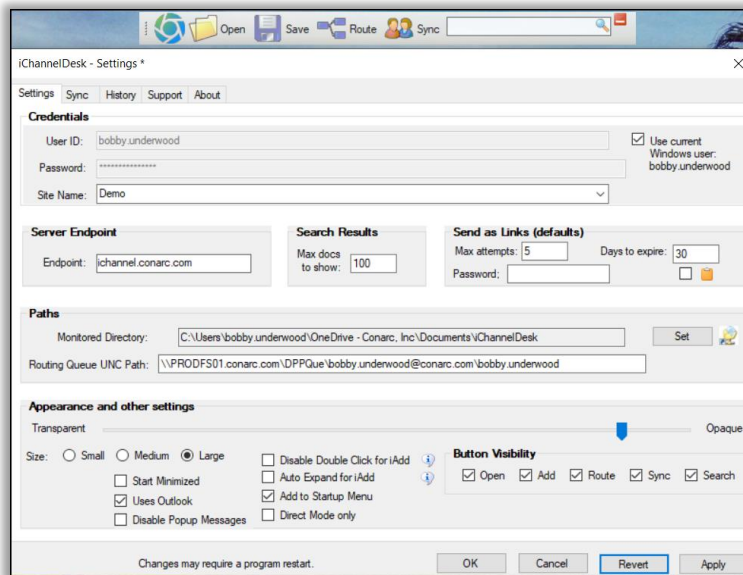| Steps for How to Customize iChannelDesk Toolbar	
Step	**Action**

1 To *access* **iChannelDesk Settings**:

- *Right-click* the **iChannelDesk icon** from the toolbar.

- *Access* the **Links** icon from the **Window System Tray.** *Right-click* the **iChannelDesk icon**, *select* **Restart iChannelDesk**.

The **IChannelDesk – Settings** window displays.

Changes made to any iChannelDesk Setting may require a program restart.

2 A few common **iChannelDesk settings** to consider:

- **Settings Tab - Appearance and Other Settings**
    1. **Transparent | Opaque** – *slide* the **blue slider** to determine how much **transparency** or **opaque** you would like the Toolbar to appear.
    2. **Size** – the icons displayed on the iChannelDesk Toolbar can be customized to appear

     Small, **Medium**, or **Large**.

3. **Button Visibility** – to customize what icons appear on the iChannelDesk Toolbar, *select* the **checkbox next to each option**.
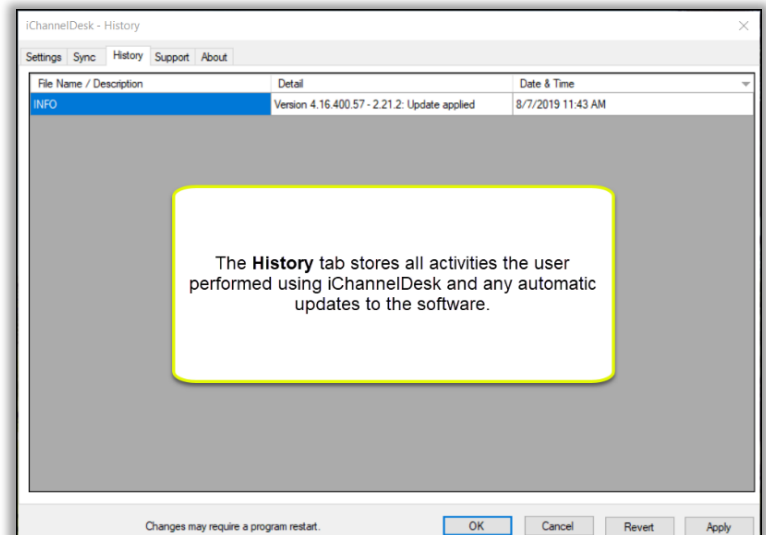
  ▪ **Additional Settings:**

    • Start Minimized

    • Uses Outlook

    • Disable Popup Messages

    • Disable Double Click for Add

    • Auto Expand for Add

    • Direct Mode only

• **Sync Tab**

  ○ Users can define how often to sync items in iChannelDesk

    ▪ Contacts

    ▪ Calendar/Tasks

    ▪ Emails

    ▪ Auto-Sync to run

      • On Startup | Frequency | On Exit
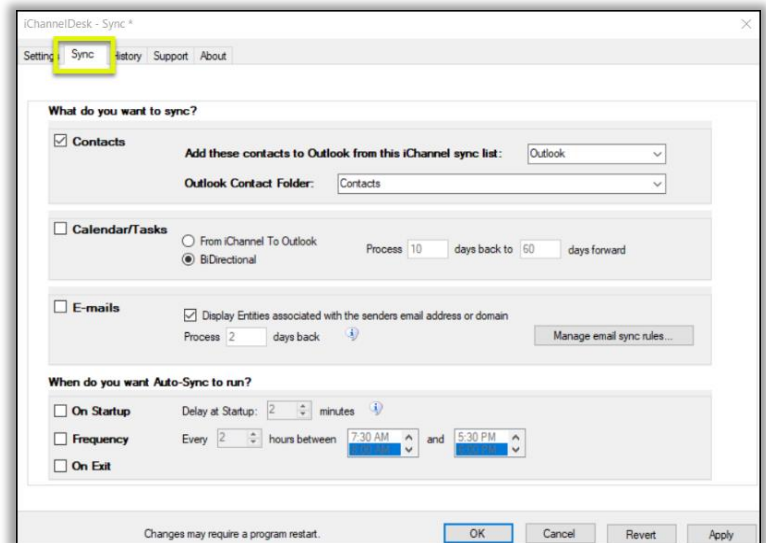
• **History Tab -** To view the History of activities performed in iChannelDesk, *select* the **History** tab.

The **History** tab stores all activities the user performed using iChannelDesk and any automatic updates to the software.
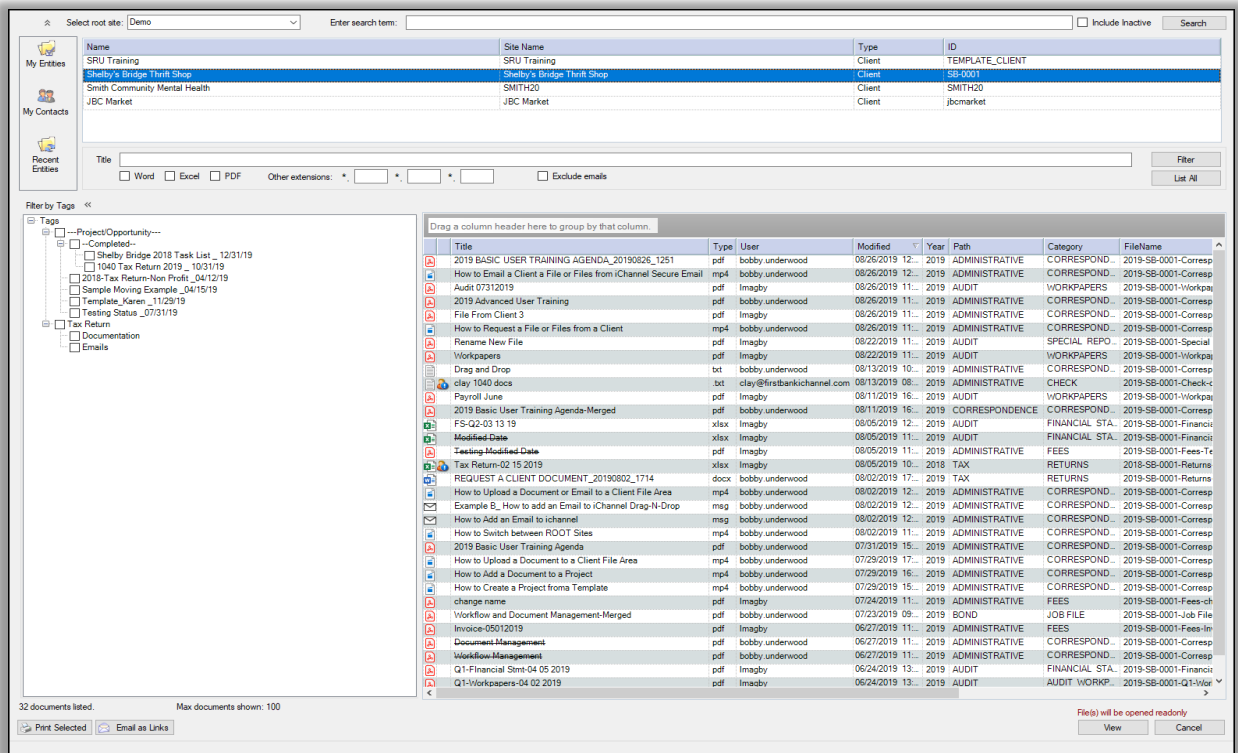
iChannel Desk (ICD)

iCHANNEL

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 Sites
- View My Sites, My Contacts, My Recent Sites
- View and Search for Client File(s)
- Filter by Tags, Workflows
- Drag-and-Drop Files and Emails directly into iChannelDesk
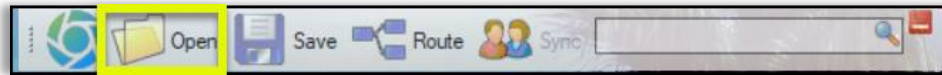- Print and Email Links directly from iChannelDesk

How to Search for a Site

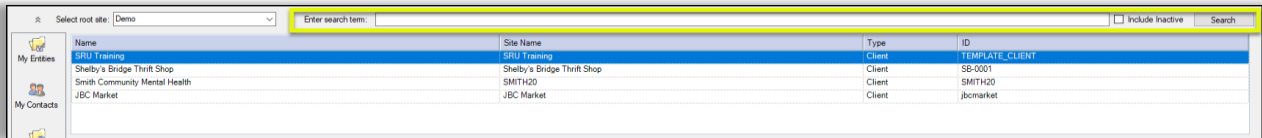## Steps for How to Search for Sites or Contacts

Step	Action
1	From the **iChannelDesk Toolbar**, *click* the **folder icon**.

In the **Enter Search Term** field, *enter* "at least" the letters for the Site you are searching.

- By default, the sites that you have permission to view, will display in the Site section.
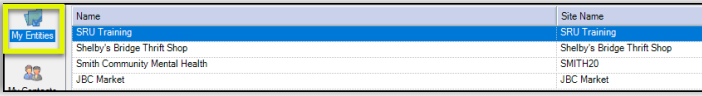
How to View My Sites, My Contacts, My Recent Sites
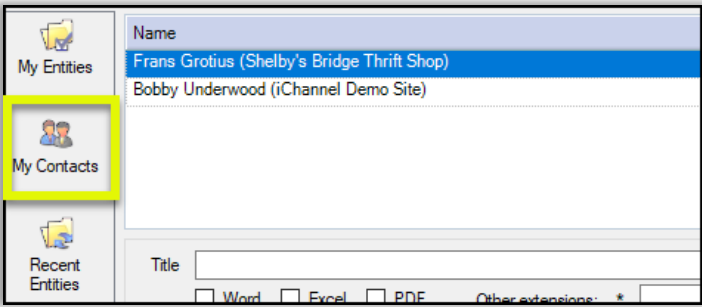
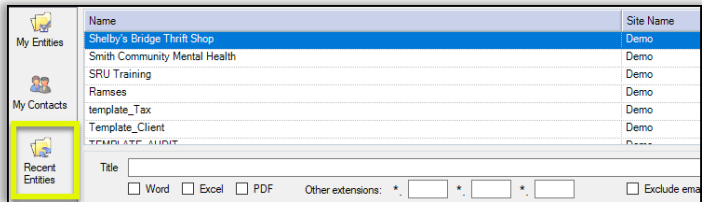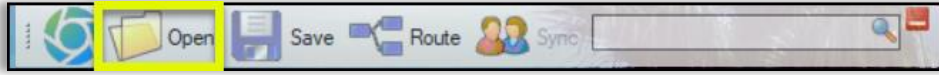| Steps for How to View Sites, My Contacts, My Recent Sites	
Step	**Action**
1	From the **iChannelDesk Toolbar**, *click* the **folder icon**. To view **My Sites**, *click* . To view **My Contacts**, *click* . To view **Recent Sites**, *click* .

How to View and Search for Client File(s)

Steps for How View and Search for Client File(s)	
Step	**Action**
1	From the **iChannelDesk Toolbar**, *click* the **folder icon**. *Double-click* a **Site** from the available list of sites. The Sites file(s) will display in the File Area.

2 To narrow your search for a file(s), use the file **Filter** features; *select* [Filter] to display the results.

• To return all your file(s) for an Site, *select* [List All] **.**

3 To search for file(s) based off a **Filter: Column Headings**:

• *Select* a column heading, *click-and-drag* the **column header** to the grey bar area.

• To add *additional Column headings* to the **filter**, *repeat* the **click-and-drag steps** listed above*.
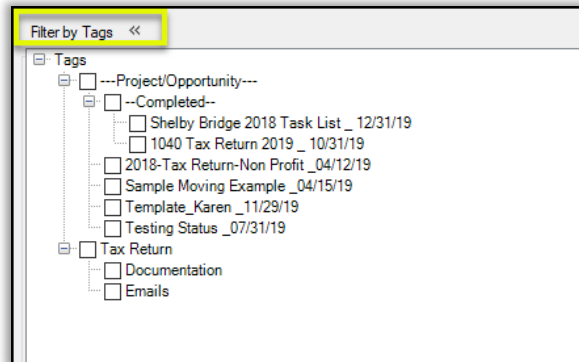

• To *view* a **file**, *double-click* a **file** in the **File Area**.

- To clear Filters: Column Headings, *select* [List All].

| 4 | To search for a file(s) associated by **Tags** and/or a **Workflow**, *select* all necessary **Tags** or **Workflow** **checkboxes** in the **Filter by Tags** section. |

How to Add File(s)

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

- **Copy** – this operation will make a copy of the source file 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 file from your local machine into iChannel.

Steps for How to Add File(s)

Step	Action
1	Locate the file(s) that you want to upload to a Clients File Area. *Click and Drag* the **file(s)** over the **Save** icon on the **iChannelDesk Toolbar**. • **Copy** – highlight a file(s) and *hold down* the "**CTRL**" key at the same time as you drag the file(s) over the Save icon on the iChannelDesk ribbon. • **Move** – highlight a file(s) and drag the file(s) over the Save icon on the iChannelDesk ribbon.
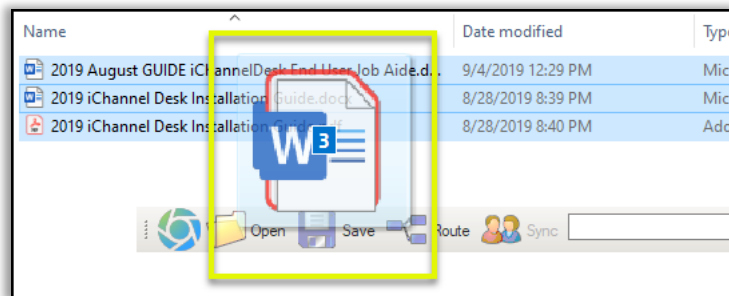
The **Add New to iChannel** window will display.
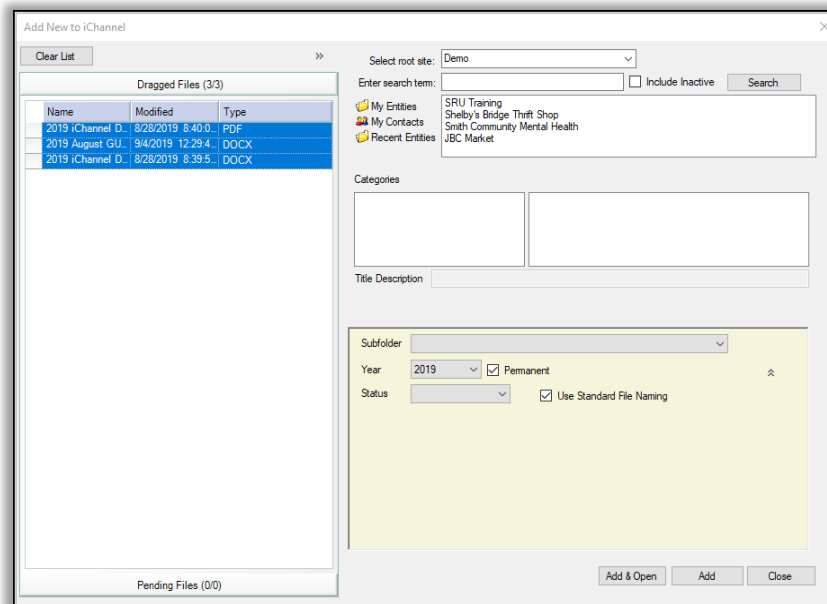
| 2 | When *uploading* a file into iChannel using iChannelDesk, you can: |

- Upload one file at a time
- Upload several file(s) at the same time
- Upload file(s) to different Sites, Categories, Tags, Workflows as needed

   Add New File(s) to iChannel using iChannelDesk
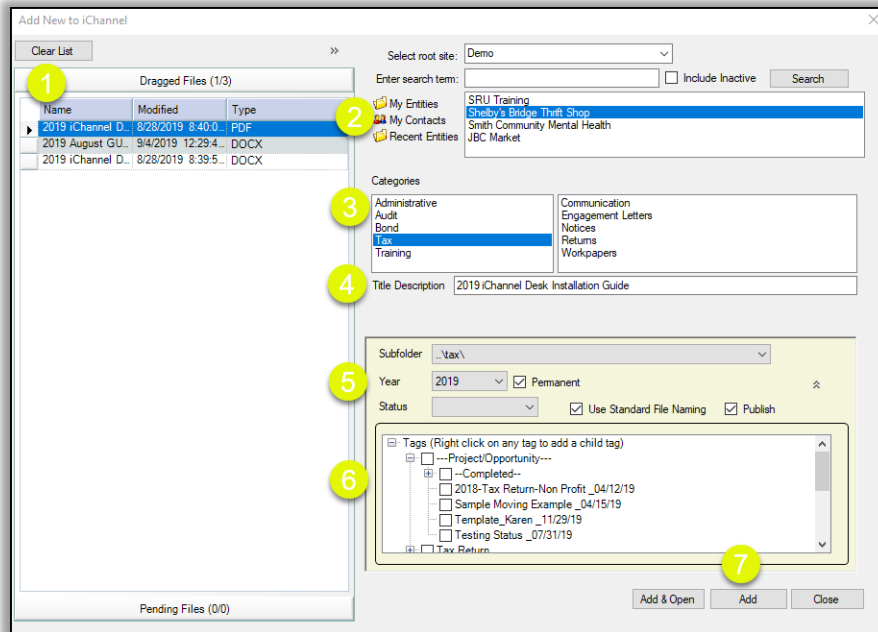
1. *Click* the **box or boxes next to the file(s) name** in the **Dragged Files** section.
2. *Select* either **My Sites**, **My Contacts**, **Recent Sites** to upload the file.
3. *Select* the **Categories (Primary | Secondary)**.
4. If the uploaded file title needs to be modified, *update* in the **Title 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 **Workflow**, *as necessary*.
7. *Click* **Add & Open**, **Add**, or **Close**.

📝 How to Add an Email

As with adding file(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 file 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 Files features apply to emails as with other file 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.

Steps for How to Add an Email

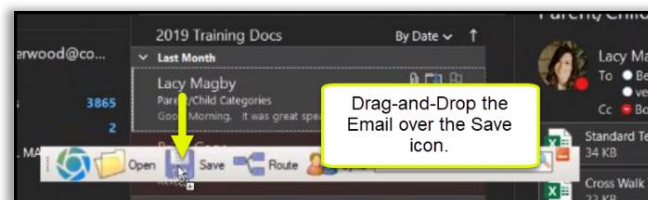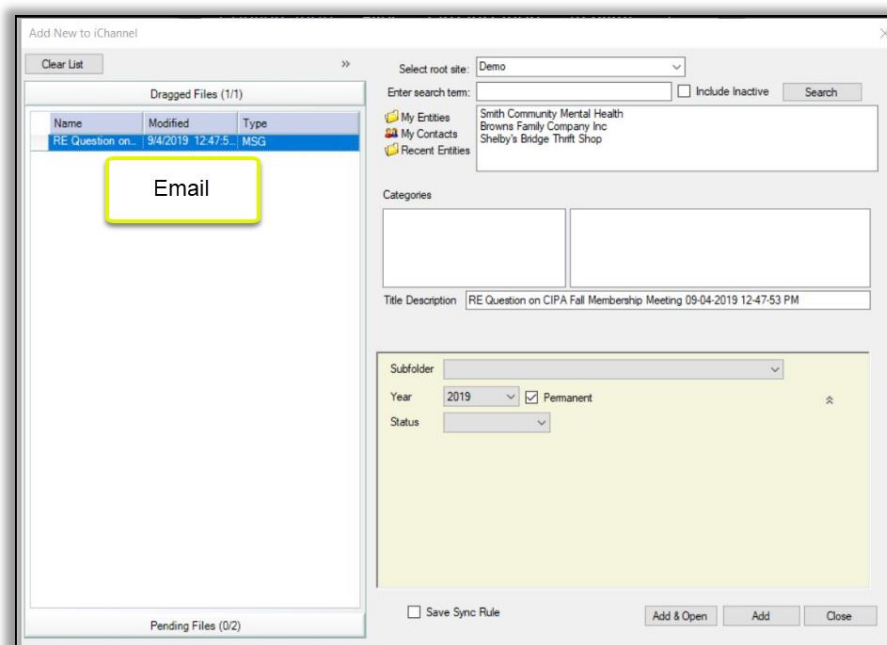| Step	Action
1	*Locate* the **email(s)** that you want to upload to a Clients File Area. *Click and Drag* the **email(s)** over the **Save** icon on the **iChannelDesk Toolbar.** The **Add New to iChannel** window will display.
2	When *uploading* an **email** into iChannel using iChannelDesk, you can: • Upload one email at a time • Upload several email(s) at the same time • Upload email(s) to different Sites, Categories, Tags, Workflows as needed 🔘 **Add Email(s) to iChannel using iChannelDesk**
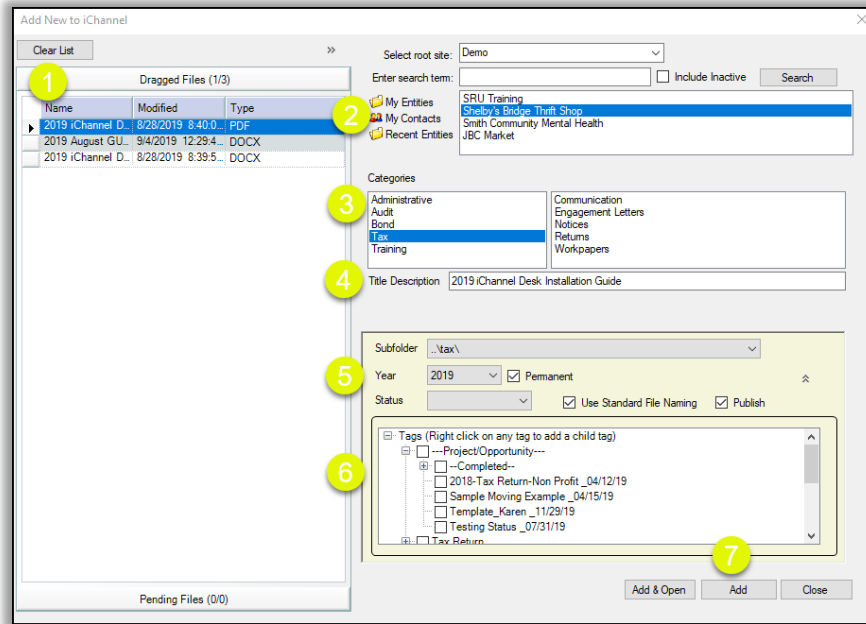
1. *Click* the **box or boxes next to the email(s) name** in the **Dragged Files** section.

2. *Select* either **My Sites**, **My Contacts**, **Recent Sites** to upload the email.

3. *Select* the **Categories (Primary | Secondary)**.

4. If the uploaded email 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 **Workflow**, *as necessary*.

7. *Click* **Add & Open**, **Add**, or **Close**.

How to Add a File(s) – Routing Queue

To add file(s) to your **Routing Queue**, *drag and drop* the file(s) to the **Route** icon on the iChannelDesk Toolbar. The file(s) will appear in your routing "**Inbox**" in iChannel.
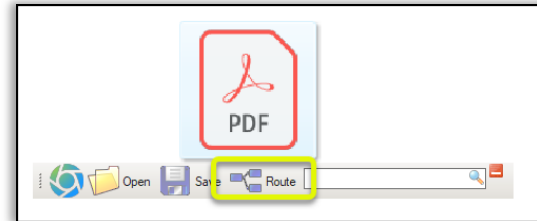
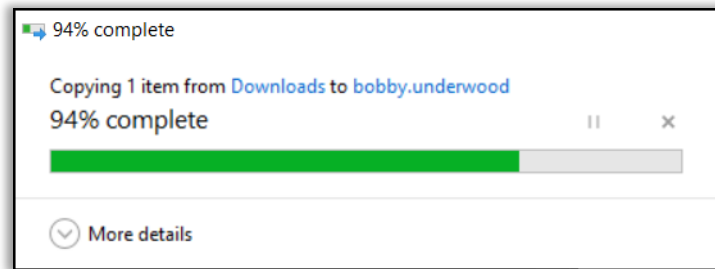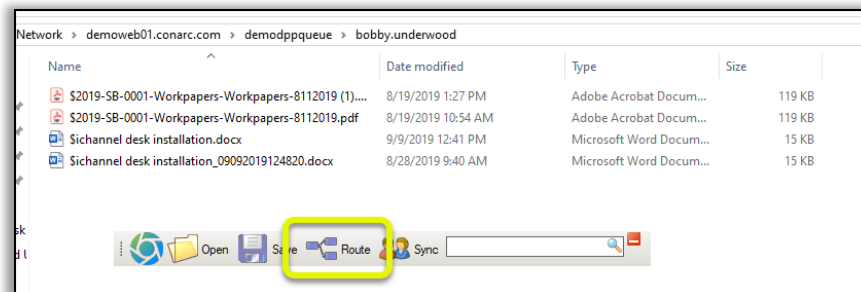| Steps for How to Add a File(s) – Routing Queue	
Step	**Action**
1	*Locate* the **file(s)** that you want to upload to a Clients File Area. *Click and Drag* the **file(s)** over the **Routing** icon on the **iChannelDesk Toolbar.** The **Upload** window will display.
2	To *view* **file(s)** in the Route que, *click* the **Route** icon on the iChannelDesk toolbar. • The **Route** folder will display.

How to Save File(s) Directly to iChannelDesk – Monitor Folder
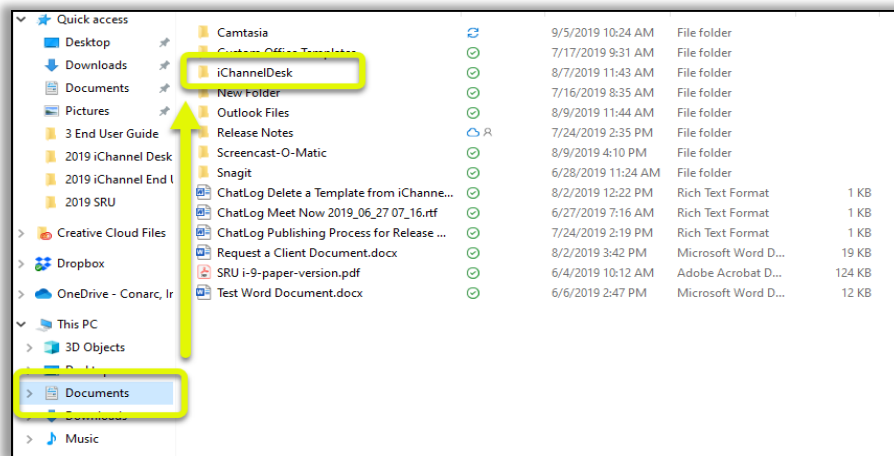
Create and Save new file(s) directly in iChannelDesk using the **Monitor Folder**. All file(s) that are created and saved directly to iChannelDesk using the Monitor Folder will appear in the **Pending Files** section of the File Area. The Monitor Folder feature is intended to make it easier for a user not having to save first to their local drive or to a network folder.
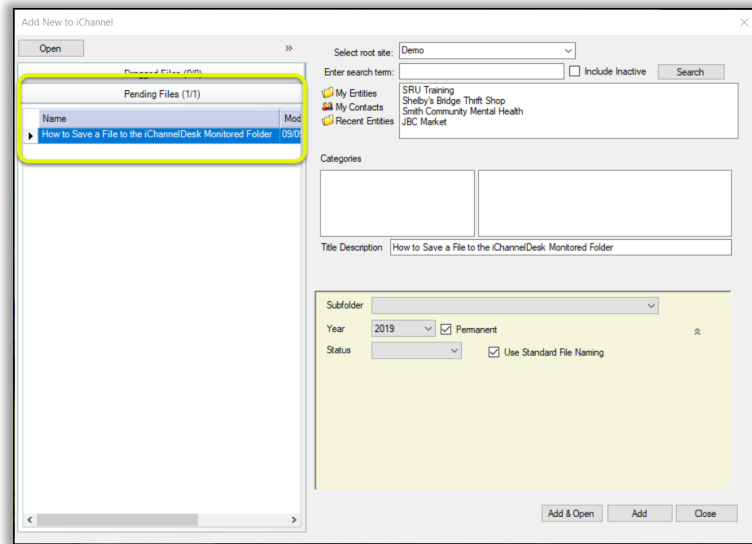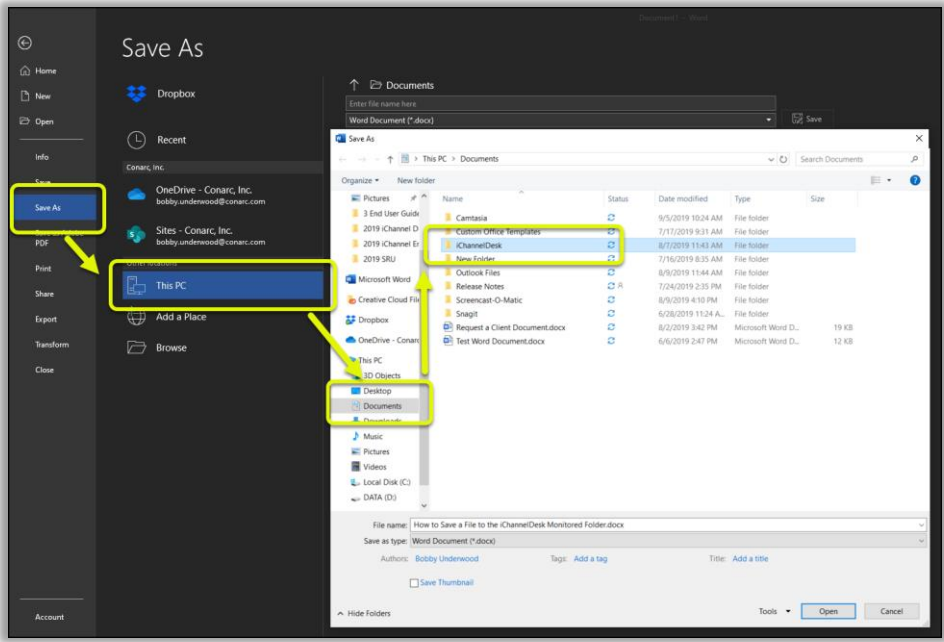
By *default*, when iChannelDesk is installed, the install will *create* a new folder in **Files** called "i**ChannelDesk**".

Steps for How to Save File(s) Directly to iChannelDesk	
Step	**Action**
1	*Create* a new **file(s)**. (i.e., Word, Excel, PDF, etc.) *Select* **File > Save As > {Browse}** to the **Files > iChannelDesk** folder.

| 2 | To *access* **iChannelDesk Pending Files:** |

- *Right-click* the **iChannelDesk icon** from the toolbar.

- *Access* the **Links** icon from the **Window System Tray.** *Right-click* the **iChannelDesk icon**, *select* **Restart iChannelDesk**.
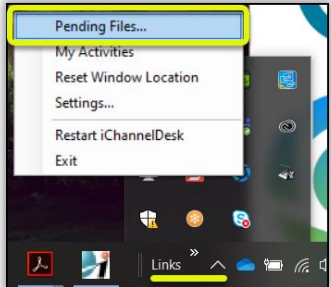
The **Add New to iChannel** window will display. The new file(s) will appear in the **Pending**

Files section.
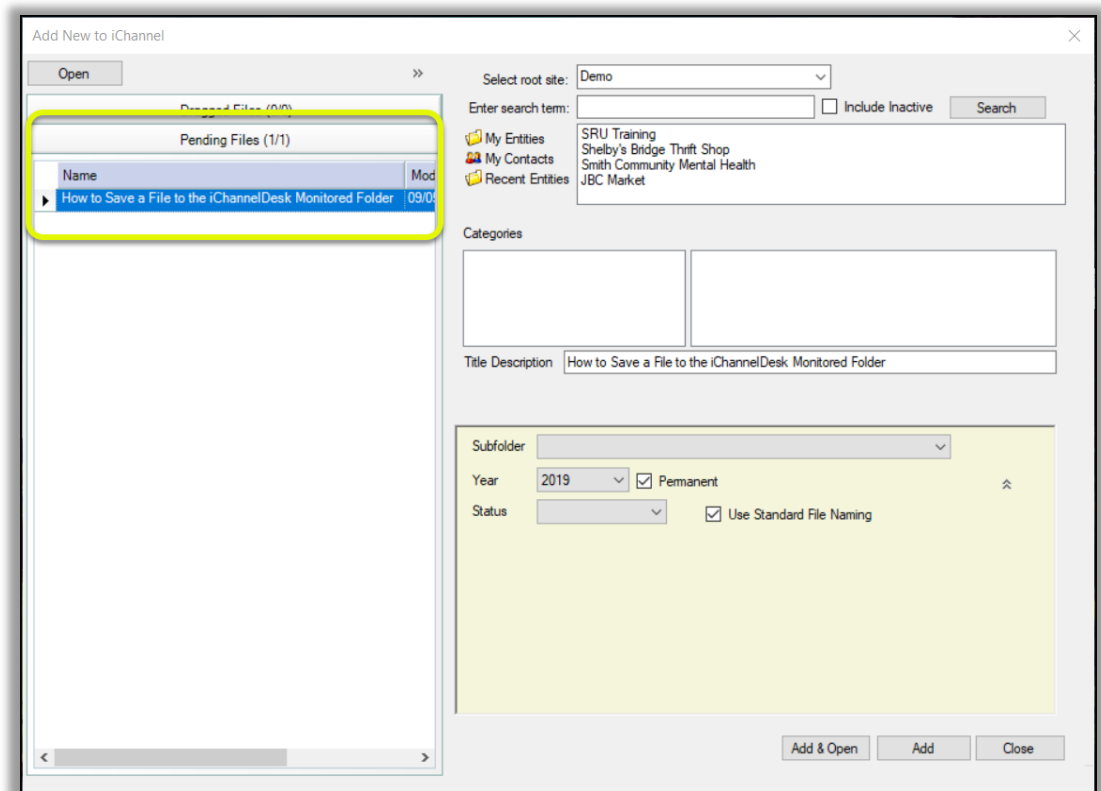

1. *Click* the **box or boxes next to the file(s) name** in the **Pending Files** section.
2. *Select* either **My Sites**, **My Contacts**, **Recent Sites** to upload the email.
3. *Select* the **Categories (Primary | Secondary)**.
4. If the uploaded email title needs to be modified, *update* in the **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 **Workflow**, *as necessary*.
7. *Click* **Add & Open**, **Add**, or **Close**.

iChannel Desk (ICD)

📝 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 **Responsbile1** 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:
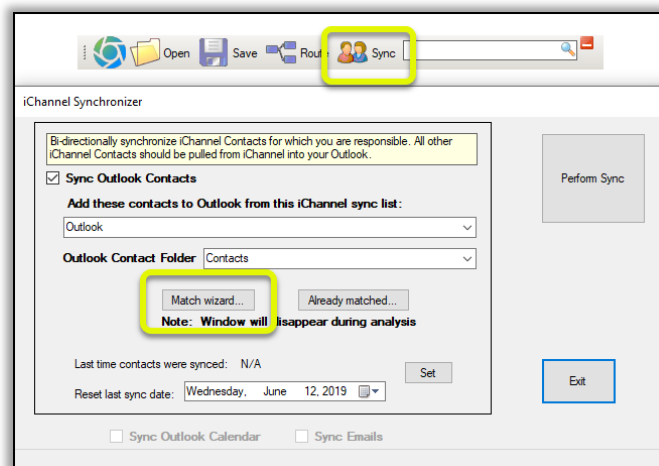
- Manual iChannel Sync
- iChannel Prompt Wizard

| 1 | **Designate Personal Contacts** – once a contact in Outlook is identified as Personal, iChannelDesk will ignore these going forward.

Open **iChannelDesk** and *click* the **Sync** icon. The **iChannel Synchronizer** box will display.

Click the **Match Wizard** button. The **Contact Sync Wizard** window displays. | |

In the **From your Outlook**, *select* the items that you want to **Search**, **Match**, or **Make Personal**.

IdSite 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.

2 | **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.

- *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.

- *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 **Site** name in the **Name** field and *click* **Search**.

- *(2) Choose* the **Site** from the resulting list. If the Site does not exist, you **cannot** add the contact now. The Site 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.

4	**Adding Contacts from iChannel to your Outlook -** within iChannel, you can specify the contacts that you want sync'd with Outlook. This is done via the **Personal List** *called* "**Outlook**." Please see the iChannel User Guide for instructions on how to set this up.

Once your list has been saved, you are ready to add those contacts to Outlook.

- *Open* **Outlook** and **iChannelDesk**.
- *Click* the **Sync** icon on *iChannelDesk*. The **iChannel Synchronizer** box opens*.*

Check the box **Sync Outlook Contacts**. You may have multiple sync lists and they will appear in the drop-down list to choose from.
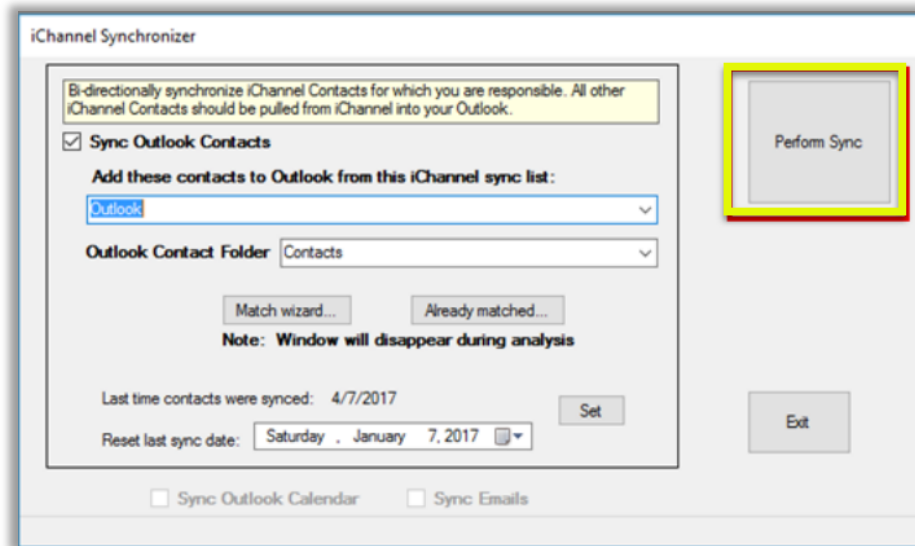
- *Click* the **Perform Sync** button.
- iChannel Desk will run and when complete, the **Contact Sync Wizard** will open if you have *unmatched contacts*.
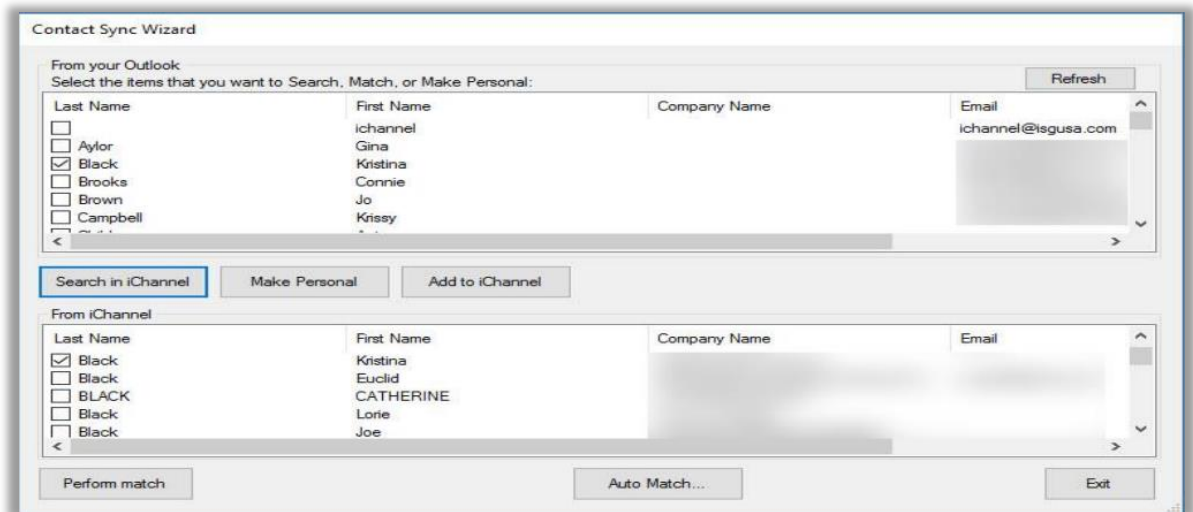
- You may continue to work on the unmatched contacts or skip this step by *clicking* the **Proceed with Sync** button. The **iChannel Contact Synchronizer** will run and display a status bar at the bottom of the box.
- When the sync occurs, the base contact information is synched such as name, company, 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.

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.

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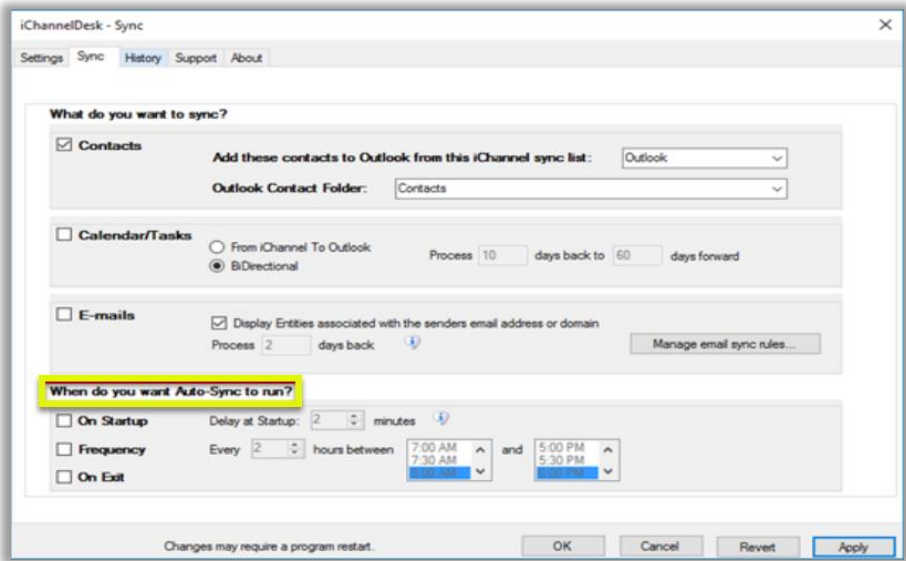
You can now manually sync during auto sync wait. No matter what you are syncing, new functionality verifies that a manual Sync is not active when initiating the Auto-Sync process; if it is, the Auto-Sync is abandoned. The Sync Button is disabled during the Auto-Sync process and enabled when it is finished.

How to Perform a Quick Search

iChannelDesk can perform a quick Site (client) or contact search using the Quick Search feature on the iChannelDesk toolbar.
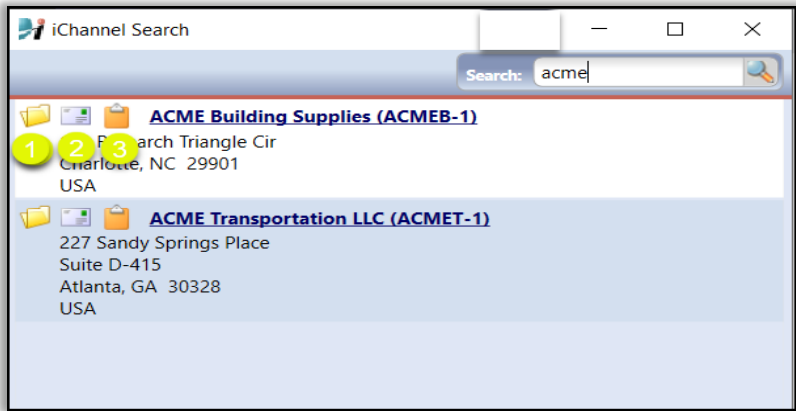
1. If you are logged into iChannel, *click* the **Folder** link will reload the browser window to the File Area of the Site selected.

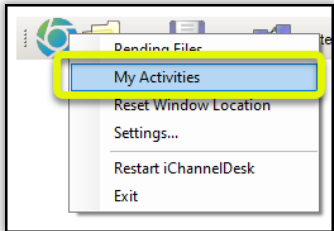2. *Click* **Email** icon will reload the browser to the Site's Email area.

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

How to View My Activities

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

Steps for How to View My Activities	
Step	**Action**
1	To *access* **My Activities**: • *Right-click* the **iChannelDesk icon** from the toolbar and *select* **My Activities**. • *Access* the **Links** icon from the **Window System Tray.** *Right-click* the **iChannelDesk icon**, *select* **My Activities**. The user will be *redirected* to **iChannel | User Activity** tab.
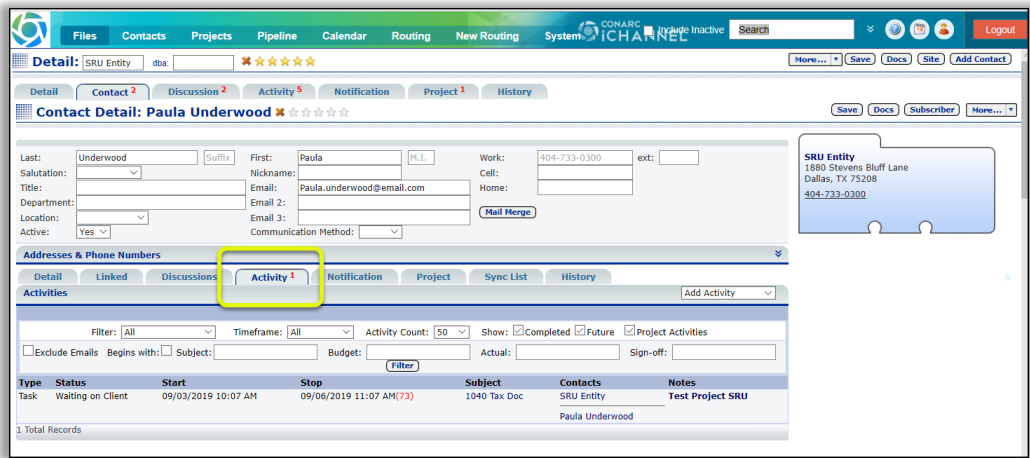
iChannelDesk Support

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.