iCHANNEL



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.

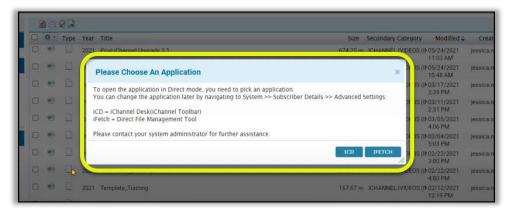
When determining what configuration to set up for a user, there are three configuration options:

• 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.

Contacts	Calendar	Workflow	System	Open ConarciFetch?			Include Inactive shel	*	000	
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N			2021 SQLTra	ning_Wolf_ 21699		220.87 m	ICHANNEL IVIDEOS (IN02/10/2021	jessica.mccord	02/10/2021	

- 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.

SYSTEM » Advanced Settings Mainte	nance: Bobby Underwood		System	internal.conarc.com says DIRECTMODEPROGRAM: Sets the direct mode program according to
CALENDTIME: 18 CALSTARITIME: 7 DIRECTMODEPROGRAM: 2	?	*Required *Required Delete	l Settings Maintenanc	user preference.Values are 1 or 2. Value Representation : 1-ICD 2-IFETCH
mana	references are gement in the DEPROGRAM field.	Delete	5/	User Preferences: alue = 1 - ICD (iChannelDesk) is perfered method to manage files. /alue = 2 - iFetch is perfered method to manage files.





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
- Soute file(s) directly to iChannel
- Save file(s) directly to IChannelDesk Monitor Folder (Pending Files)
- Sync Outlook Contacts into iChannel

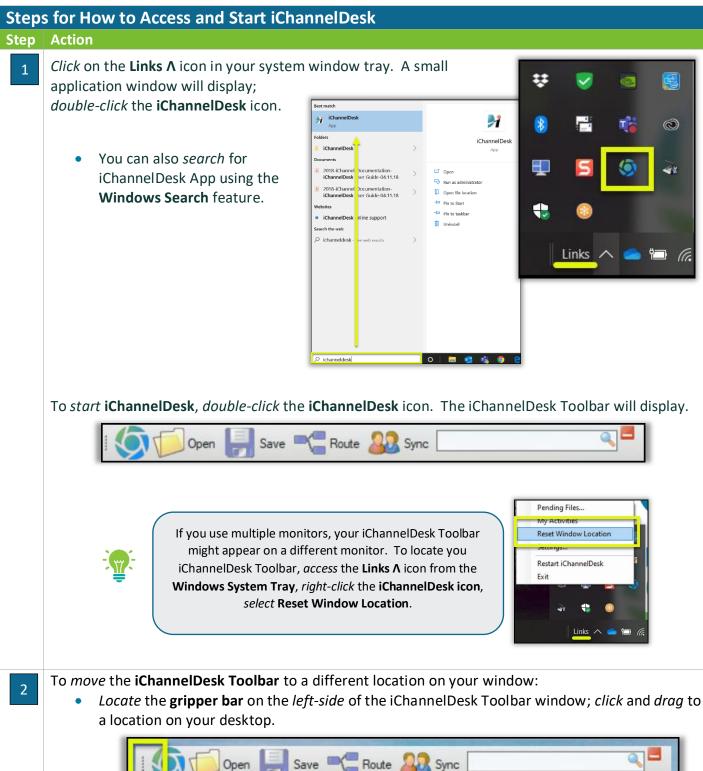


Contact your IT System Administrator if you currently do not have iChannelDesk installed on your workstation.

This guide will provide <i>step-by-step actions</i> for clients to access, download and upload Files using iChannelDesk.	E Seef of the Source - Lower See Source - Lower Sec Source - Lower Sec Source - Lower Sec Source - Lower All Source - Low	Section Society Station Station All Near All Near	Type 0 Class TBH-UTE_CLEAT Class Distant Class SWIDD Class Donesed) [] Induk Induk Sijay). T
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뇌 How to Access and Start iChannelDesk





3	To <i>re-start</i> iChannelDesk, <i>access</i> the Links A icon from the Window System Tray. <i>Right-click</i> the iChannelDesk icon , <i>select</i> Restart iChannelDesk .	Pending Files
		My Activities Reset Window Location Settings Restart iChannelDesk
4	To exit iChannelDesk, access the Links Λ icon from the Windows System Tray. <i>Right-click</i> the iChannelDesk icon , <i>select</i> Exit .	Pending Files My Activities Reset Window Location Settings Pertart iChannelDack Exit Exit Exit Exit Exit Exit

How to Customize iChannelDesk Toolbar

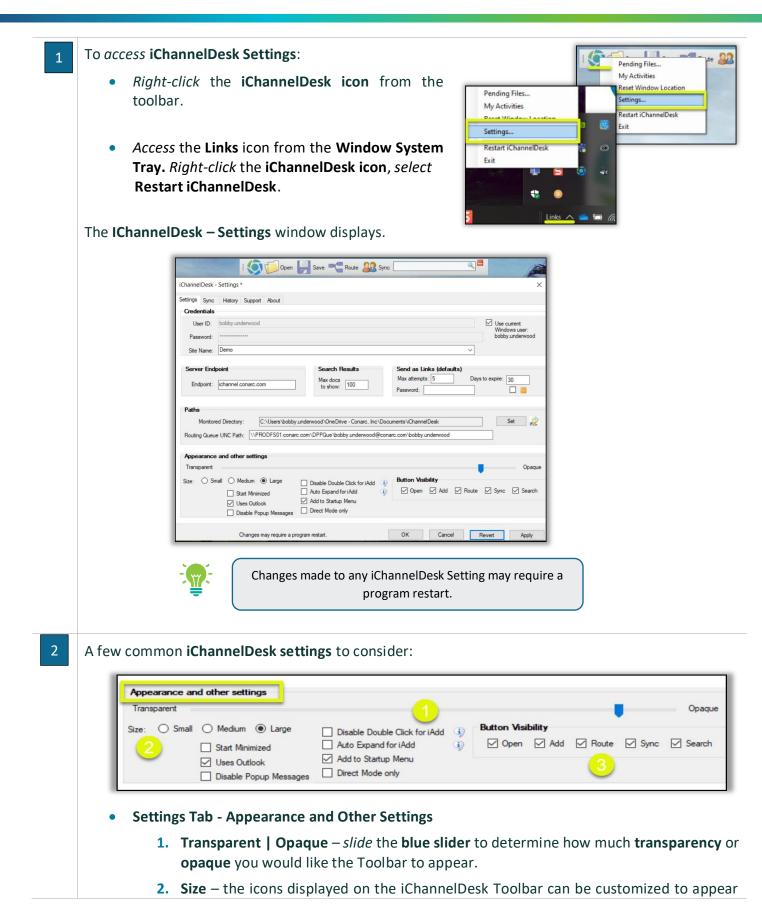
iChannelDesk Toolbar is easily customizable by each user and is unique to each user via the **Settings** feature. A few features that users can customize are:

- 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

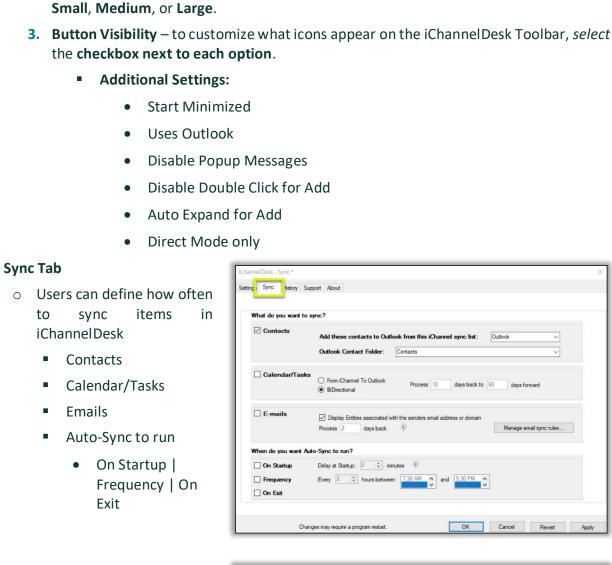
Steps for How to Customize iChannelDesk Toolbar Step Action



iCHANNEL







History Tab - To view the History of activities performed in iChannelDesk, select the History tab.

	Detail	Date & Time	
õ	Version 4.16.400.57 - 2.21.2: Updat	e applied 8/7/2019 11:43 AM	
	The History tab stores all a performed using iChannelDes updates to the so	k and any automatic	

Add these contacts to Outlook from this iChannel sync list: Outlook

Display Entities associated with the senders email address or domain

Every 2 <a>hours between 7:30 AM and 5:30 PM

days back 🕔

Process 10

days back to 60

days forward

Manage email sync rules...

OK Cancel Revert Apply

Outlook Contact Folder: Contacts

Delay at Startup: 2 🔹 minutes 🕔

O From iChannel To Outlook

BiDirectional

Process 2



\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 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

\Sigma How to Search for a Site

	ect root site: Demo	Enter search term:							Include	Inactive	Sean
	Name		Site Name			Туре	ID				
ly Entities	SRU Training		SRU Training			Client	TEMP	PLATE_CLIENT			
	Shelby's Bridge Thrift Shop		Shelby's Bridge Thrift Shop			Client	S8-0	001			
88	Smith Community Mental Health		SMITH20			Client	SMIT	H20			
	JBC Market		JBC Market			Client	jboma	arket			
Contacts											
Recent	Title										Fite
intities	Word Excel PDF	Other extensions: *, *,	*. Exclude emails								List
erby Tags	«										
	Project/Opportunity		Drag a column header here to group by that column.								
•	Completed Shelby Bridge 2018 Task List _ 12/31/19		Title	Туре			Year Path		Category	FileName	
	Shelby Bridge 2018 Task List _ 12/31/19 1040 Tax Return 2019 10/31/19		2019 BASIC USER TRAINING AGENDA_20190826_1251		bobby.underwood	08/26/2019 12:			CORRESPOND	2019-SB-00	
	2018-Tax Return-Non Profit _04/12/19		How to Email a Client a File or Files from iChannel Secure E		bobby.underwood	08/26/2019 12:.			CORRESPOND	2019-SB-00	
	Sample Moving Example _04/15/19		Audit 07312019	pdf	Imagby	08/26/2019 11:.			WORKPAPERS	2019-SB-00	
	Template_Karen _11/29/19		2019 Advanced User Training		bobby.underwood	08/26/2019 11:.			CORRESPOND	2019-SB-00	
	Testing Status _07/31/19		File From Client 3	pdf	Imagby	08/26/2019 11:			CORRESPOND	2019-SB-00	
	Documentation		How to Request a File or Files from a Client		bobby.underwood	08/26/2019 11:.			CORRESPOND		
	Documentation Emails		Rename New File	pdf	Imagby	08/22/2019 11:			SPECIAL REPO	2019-SB-00	
			Workpapers	pdf	Imagby	08/22/2019 11:.			WORKPAPERS	2019-SB-00	
			Drag and Drop	txt	bobby.underwood	08/13/2019 10:			CORRESPOND_	2019-SB-00	
			Clay 1040 docs	.bxt	clay@firstbankichannel.com				CHECK	2019-SB-00	
			Payroll June	pdf	Imagby	08/11/2019 16:			WORKPAPERS	2019-SB-00	
			2019 Basic User Training Agenda-Merged		bobby.underwood			RRESPONDENCE		2019-SB-00	
			FS-Q2-03 13 19		Imagby	08/05/2019 12:			FINANCIAL STA.		
			Modified Date		Imagby	08/05/2019 11:.			FINANCIAL STA.		
			Testing Modified Date		Imagby	08/05/2019 11: 08/05/2019 10:			FEES RETURNS	2019-SB-00 2018-SB-00	
			Tax Return-02 15 2019 REQUEST A CLIENT DOCUMENT 20190802 1714		Imagby	08/02/2019 10:			RETURNS	2018-SB-00 2019-SB-00	
					bobby.underwood bobby.underwood	08/02/2019 17				2019-SB-00 2019-SB-00	
			How to Upload a Document or Email to a Client File Area Example B_How to add an Email to iChannel Drag-N-Drop		bobby.underwood	08/02/2019 12:				2019-SB-00 2019-SB-00	
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			2019 Basic User Training Agenda	pdf	bobby.underwood	07/31/2019 15:				2019-SB-00	
			How to Upload a Document to a Client File Area		bobby.underwood	07/29/2019 17:				2019-SB-00	
			How to Add a Document to a Project		bobby.underwood	07/29/2019 16:			CORRESPOND_	2019-SB-00	
			How to Create a Project froma Template		bobby.underwood	07/29/2019 15:			CORRESPOND	2019-SB-00	
			change name	pdf	Imagby	07/24/2019 11:			FEES	2019-SB-00	
			Workflow and Document Management-Merged	pdf	bobby.underwood	07/23/2019 09:			JOB FILE	2019-SB-00	
			Invoice-05012019	pdf	Imagby	06/27/2019 11:			FEES	2019-SB-00	
			Document Management	pdf	bobby.underwood	06/27/2019 11:			CORRESPOND_		
			A Workflow-Management	pdf	bobby.underwood	06/27/2019 11:			CORRESPOND		
			Q1-Financial Stmt-04 05 2019	pdf	Imagby	06/24/2019 13:			FINANCIAL STA.		
			Q1-Workpapers-04 02 2019	pdf	Imagby	06/24/2019 13:.	2019 AUE	TIC	AUDIT WORKP	2019-SB-00	01-Q
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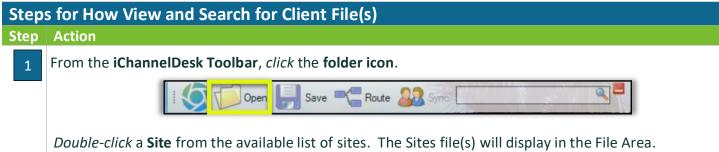
iCHANNEL

1	Name	Site Name	Type	ID	
My Entities	SRU Training	SRU Training	Client	TEMPLATE_CLIENT	
	Shelby's Bridge Thrift Shop	Shelby's Bridge Thrift Shop	Client	SB-0001	
	Smith Community Mental Health	SMITH20	Client	SMITH20	
ANV Contacts	JBC Market	JBC Market	Client	jbomarket	

How to View My Sites, My Contacts, My Recent Sites

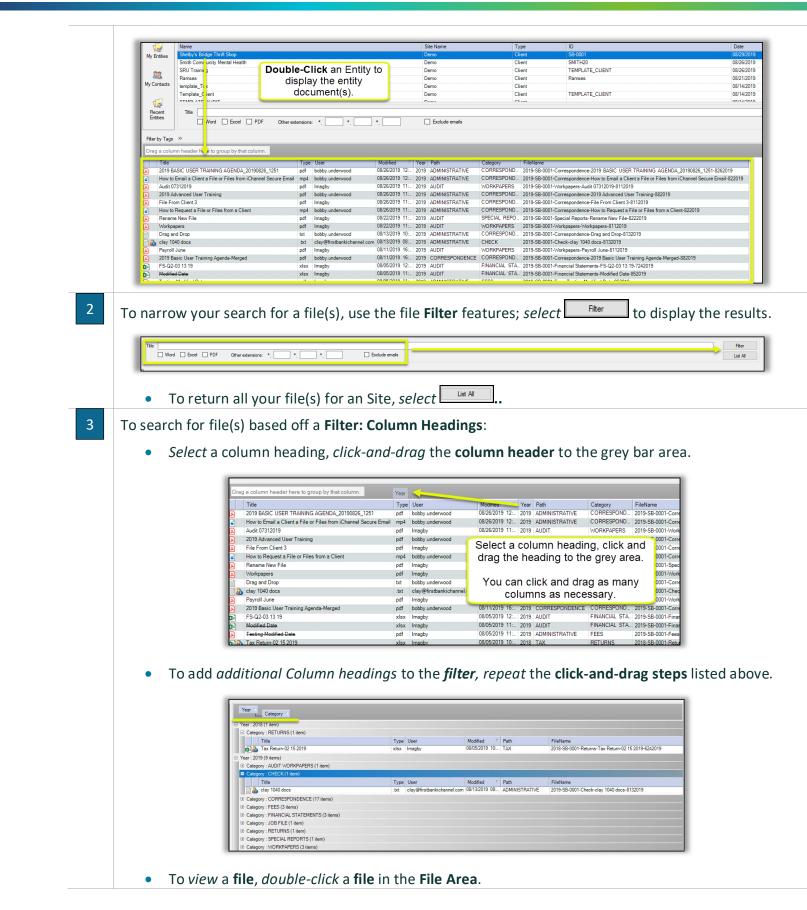
р	Action		
	From the iChannelDesk Toolbar , <i>click</i> the	folder icon.	
	I Open I Save	Route 🔐 Symo	
	To view My Sites, <i>click</i> Wy Entities.	Bull Friting S Selety's Bridge Thrift Shop S Smith Community Mertal Health S	ite Name RU Training helby's Bridge Thrift S MITH20 BC Market
	To view My Contacts , click My Contacts.	My Entities Name Frans Grotius (Shelby's Bridge Thrift Shop) Bobby Underwood (iChannel Demo Site)	
	To view Recent Sites , click	Recent Entities Title Word Evcel PDF Other extension Wy Entities Shelby's Bridge Thrift Skop Smith Community Mental Health SRU Training Ramses My Contacts Implact_Tax	Site N Demo Demo Demo Demo Demo Demo
		Template_Lint Template_Client	Demo

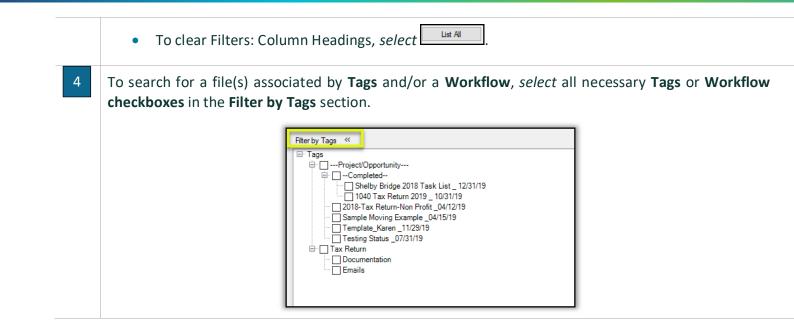
S How to View and Search for Client File(s)





iCHANNEL





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.

Step	s 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.

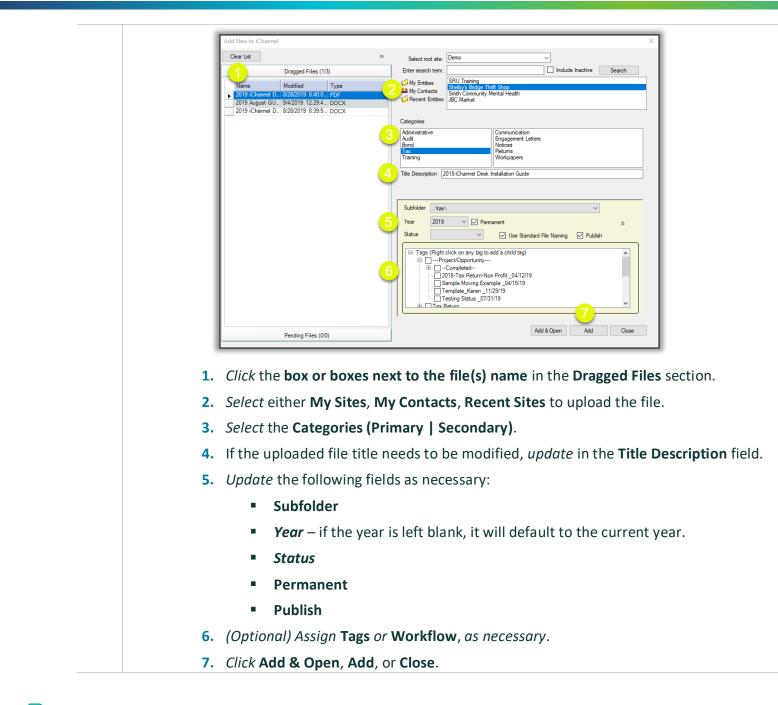


		Name	` 	Date modified	Туре
		2019 August GUIDE iCH ann		9/4/2019 12:29 PM	Micr
		2019 iChannel Desk Install		8/28/2019 8:39 PM	Micr
		2019 iChannel Desk Install	W ³	8/28/2019 8:40 PM	Adol
The	Add New to iCha	nnel window will	display.		
	Add New to	iChannel			×
	Clear List		>> Select root site: Demo	~	
	Name	Dragged Files (3/3) Modified Type	Enter search tem: My Entities SRU Training SN My Contracts Shelby's Bridge		Search
	2019 i0 2019 A	Channel D., 8/28/2019 8:40:0., PDF ugust GU., 9/4/2019 12:29:4., DOCX	A My Contacts Smith Community JBC Market	y Mental Health	
	2019 10	Channel D_ 8/28/2019 8:39:5_ DOCX	Categories		
					_
			Title Description		
			Subfolder Year 2019 V Pe Status V	wmanent ☑ Use Standard File Naming	â
		Pending Files (0/0)		Add & Open Add	Close
2 Wh	en <i>uploading</i> a file	e into iChannel usi	ing iChannelDesl	k, you can:	
	Upload one fil	e at a time			
	 Upload severa 	ll file(s) at the sam	ne time		
	• Upload file(s)	to different Sites,	Categories, Tags	s, Workflows as ne	eded
	Add New	<pre>/ File(s) to iChann</pre>	el using iChanne	elDesk	



iCHANNEL

iChannel Desk (ICD)

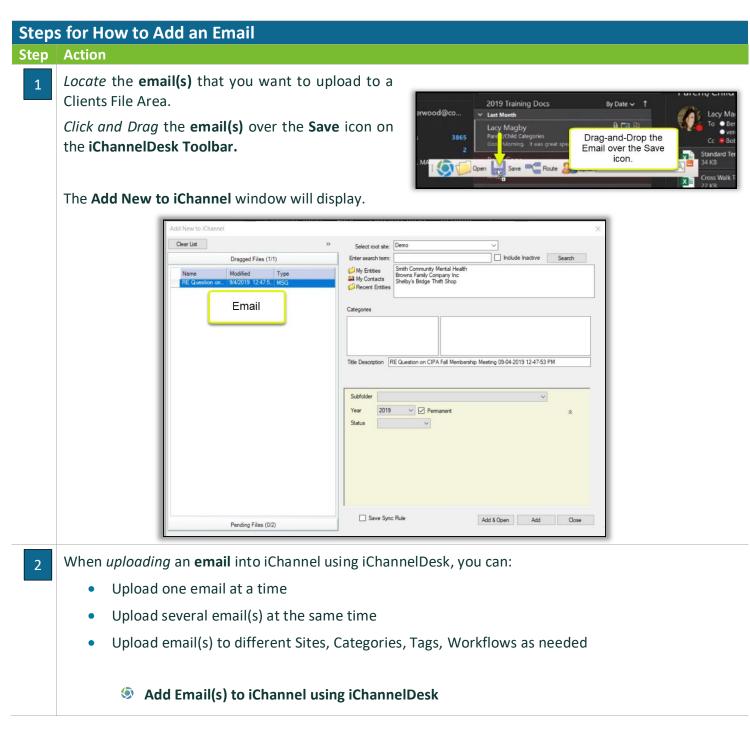


뇌 How to Add an Email

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.



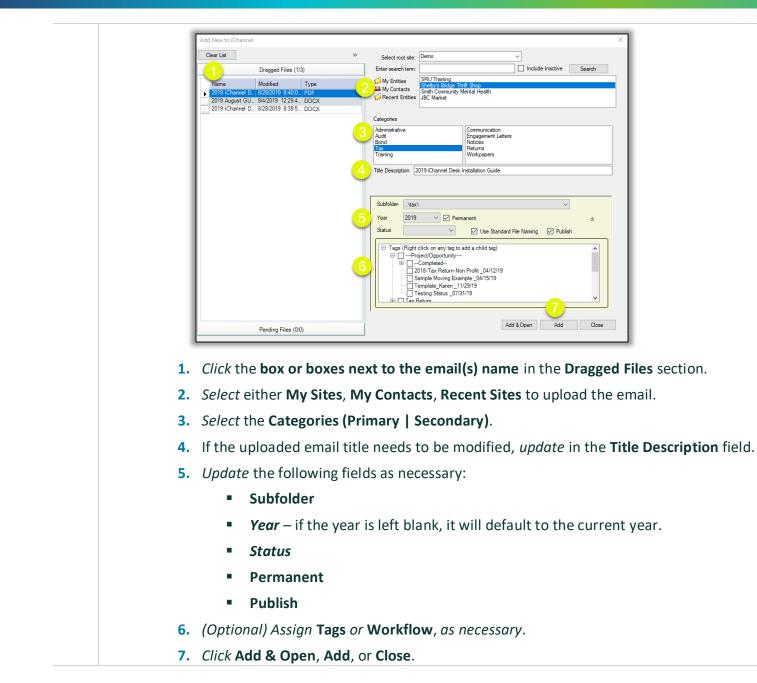
To only add the attachment in the email to iChannel using iChannelDesk, open the email with the attachment. *Click* the **attachment file(s)** and *drag and drop* the attachment to the **Save** icon on the iChannelDesk toolbar.





iCHANNEL

iChannel Desk (ICD)





Now 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.

Step	s 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.
	■ 94% complete Copying 1 item from Downloads to bobby.underwood 94% complete □ ○ More details
2	 To view file(s) in the Route que, click the Route icon on the iChannelDesk toolbar. The Route folder will display.
	Network > demoweb01.conarc.com > demodppqueue > bobby.underwood
	Name Date modified Type Size Image: Size Size Size Size Size Size Size Size

ڬ 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.



Add New to iChannel			×
Open	Select root site:	Demo	
D (0/0)	Enter search term:	Include Inactive Search	
Pending Files (1/1)	My Entities	SRU Training Shelby's Bridge Thrift Shop	
Name	A My Contacts	Smith Community Mental Health	
How to Save a File to the iChannelDesk Monitored Folder			
	Categories		
]
	Title Description	ow to Save a File to the iChannelDesk Monitored Folder]
	Subfolder		-
		~~	
	Year 2019	✓ Permanent	
	Status	✓ Use Standard File Naming	
		Add & Open Add Close	

By *default*, when iChannelDesk is installed, the install will *create* a new folder in **Files** called "iChannelDesk".

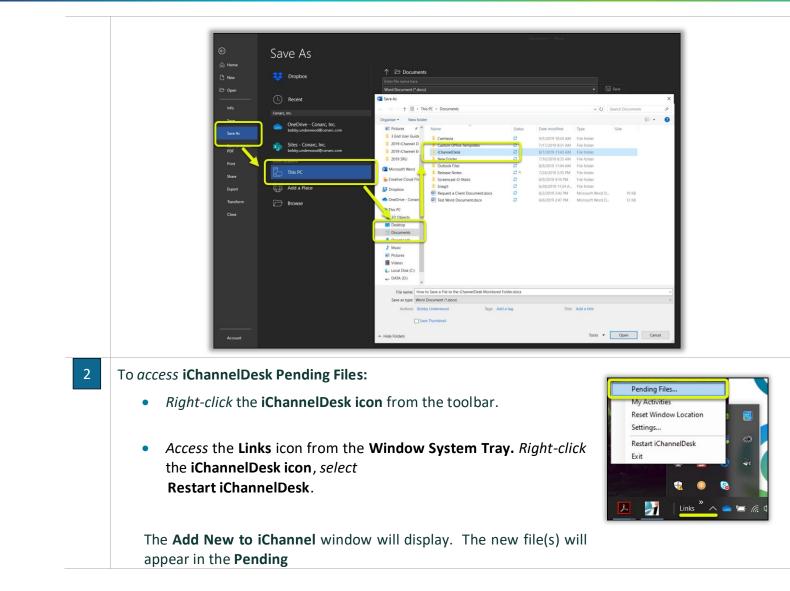
 Quick access Desktop 	📕 Camtasia	C	9/5/2019 10:24 AM	File folder	
	Curtan Office Templeter	\odot	7/17/2019 9:31 AM	File folder	
🖶 Downloads 🛛 🖈	📕 iChannelDesk	\odot	8/7/2019 11:43 AM	File folder	
🗎 Documents 🛛 🖈 😽	New Folder	\odot	7/16/2019 8:35 AM	File folder	
📰 Pictures 🛛 🖈 🖊	Outlook Files	\odot	8/9/2019 11:44 AM	File folder	
📕 3 End User Guide 🚽	Release Notes	<u>с</u> 8	7/24/2019 2:35 PM	File folder	
2019 iChannel Desk	Screencast-O-Matic	\odot	8/9/2019 4:10 PM	File folder	
2019 iChannel End L	📕 Snagit	\odot	6/28/2019 11:24 AM	File folder	
2019 SRU	🖷 ChatLog Delete a Template from iChanne	\odot	8/2/2019 12:22 PM	Rich Text Format	1 KB
2019 SKU	ChatLog Meet Now 2019_06_27 07_16.rtf	\odot	6/27/2019 7:16 AM	Rich Text Format	1 KB
🛛 ᡖ Creative Cloud Files	🖷 ChatLog Publishing Process for Release	\odot	7/24/2019 2:19 PM	Rich Text Format	1 KB
•• Develop	Request a Client Document.docx	\odot	8/2/2019 3:42 PM	Microsoft Word D	19 KB
🛛 🐉 Dropbox	🛃 SRU i-9-paper-version.pdf	\odot	6/4/2019 10:12 AM	Adobe Acrobat D	124 KB
🔹 🌰 OneDrive - Conarc, Ir	Test Word Document.docx	\odot	6/6/2019 2:47 PM	Microsoft Word D	12 KB
🖌 🍠 This PC					
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iCHANNEL

iChannel Desk (ICD)





Add New to iChan	inel		
Open	×	> Select root site:	Demo ~
	Drogod Ellos (0/0)	Enter search term:	SRU Training
Name	Pending Files (1/1)	My Entities My Contacts My Contacts	Shelby's Bridge Thrift Shop Smith Community Mental Health
	File to the iChannelDesk Monitored Folder 09		JBC Market
		Categories	
		Title Description	How to Save a File to the iChannelDesk Monitored Folder
		Subfolder Year 2019	×
		Year 2019 Status	
<		>	Add & Open Add Close
1. <i>Click</i> th	e box or boxes next t	to the file(s) name in the Pending Files section.
			cent Sites to upload the email.
			·
	the Categories (Prima		
			nodified, <i>update</i> in the Title Descript
	e the following fields a	as necessary	/:
	Subfolder		
•	Year – if the year is le	eft blank, it	will default to the current year.
	Status		
	Permanent		
:	Publish	orkflow. as	necessary.
• 6. (Optior			necessary.



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 lisapp ear during analysis Last time contacts were synced: N/A Set Exit Reset last sync date: Wednesday, June 12, 2019 Sync Outlook Calendar Sync Emails



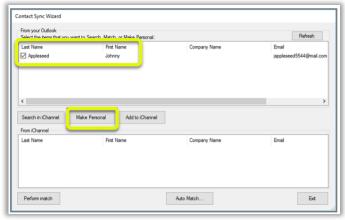
2

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.

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:		Refresh
Last Name	First Name	Company Name	Email
Appleseed	Johnny		jappleseed5544@mail.co
	Make Personal Add to Channel	1	
< Search in iChannel From iChannel	Make Personal Add to iChannel		
Search in iChannel	Add to iChannel	Company Name	Enal

• 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 Personal Last Name First Name Company Name Email Appleseed Johnny d5544@r 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 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.



	Search for Entit	y.					
Name	Bean					Search	/
Entity Ty	pe (AI)			_		2 results found	
City			9	ate	Zip		
Name		Entity Ty	pe	City	St	ste Zip	
Bean's S	locks	Testing		Apharetta	GA	30005	
Beanstal	k Networks, LLC	Lead		West Palm B	Seach FL	33401	
First Nan Adde	ne Las Da	t Name Phone vis		zdavis@	Client Name Bean's Socks		
		the Entity name above to					
Amanda		vis	amarida	.davis@c			
				s - 5			
Dee	Lov	wrey (770) 8	49-0508 diowney	@conarc	Conarc, Inc-Main (R	(too	
John LouLou Addie Amanda Dee	Leo Da Lo	myJohn omon vis vis wrey (770) 8 for each contact to add to	amanda amanda 49-0508 diowrey	adavis@ davis@c	Bean's Socks Bean's Socks Conarc, Inc-Main (R Conarc, Inc-Main (R Conarc, Inc-Main (R	(toot)	
CTEP 2		or each contact to add to	use selected errory.				
	name	Firstn	me Responsible	Company	Work Phone	Mobile Phone	t
	name	Firstru Johnny			Work Phone	Mobile Phone	

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 *i***ChannelDesk**. 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.



Bi-directionally synchronize iChannel Contacts should be	iChannel Contacts for which you are responsible. All other be pulled from iChannel into your Outlook.	
Sync Outlook Conta	acts	Perform
	to Outlook from this iChannel sync list:	
Outlook	~	
Outlook Contact Fol	der Contacts ~	•
	Already matched	
	te: Window will disappear during analysis	
Last time contacts we	re synced: 4/7/2017 Set	
Reset last sync date:	Saturday , January 7, 2017	Exit

- *Click* the **Perform Sync** button.
- iChannel Desk will run and when complete, the **Contact Sync Wizard** will open if you have *unmatched contacts*.

Delect the renis that you wan	nt to Search, Match, or Make Personal:		Refresh	h
Last Name	First Name	Company Name	Email	
	ichannel		ichannel@isgusa.co	m
Aylor	Gina			
Black	Kristina			
Brooks	Connie			
Brown	Jo			
Campbell	Krissy			
<				>
From iChannel				
From iChannel Last Name	First Name	Company Name	Email	
	First Name Kristina	Company Name	Email	
Last Name		Company Name	Email	
Last Name	Kristina	Company Name	Email	
Last Name Black Black	Kristina Euclid	Company Name	Email	
Last Name Black Black BLACK	Kristina Euclid CATHERINE	Company Name	Email	

- 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 Out	ook
Name	Entity	Last_Update
Johnny Appleseed	Bean's Socks	4/7/2017 amanda.davis_outloo
Linda Lemon	Apple Test Entity	
Calendar items touched: 0	Task items touched: 0	
	Sent up from your Outlook -> iChanne	el

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.

Already Matched	1						
			Matched Co	ntacts			
Drag a column he	ader here to group l	by that column.					
LastName	FirstName	CompanyName	StreetAddress	City	State	PostalCode	TelephoneNun
Appleseed	Johnny	Bean's Socks					
<							

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.



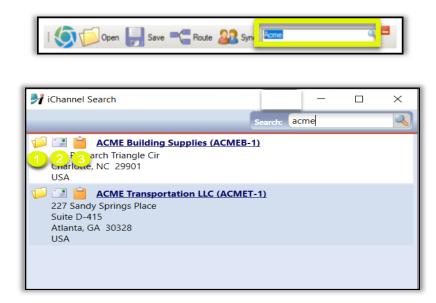
What do you want to s	ync?			
Contacts	Add these contacts to Out	look from this iChannel sync list:	Outlook ~	
	Outlook Contact Folder:	Contacts	~	
Calendar/Tasks	From iChannel To Outlook BiDirectional	Process 10 days back to	60 days forward	
L E-mails		with the senders email address or domain	Manage email sync rules	
When do you want Aut	o-Sync to run?			
On Startup	Delay at Startup: 2 0 m	inutes 🕘		
Frequency	Every 2 🔅 hours betwee	m 7:00 AM A and 5:00 PM A	•	
		7.30 PM		



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.

뇌 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.



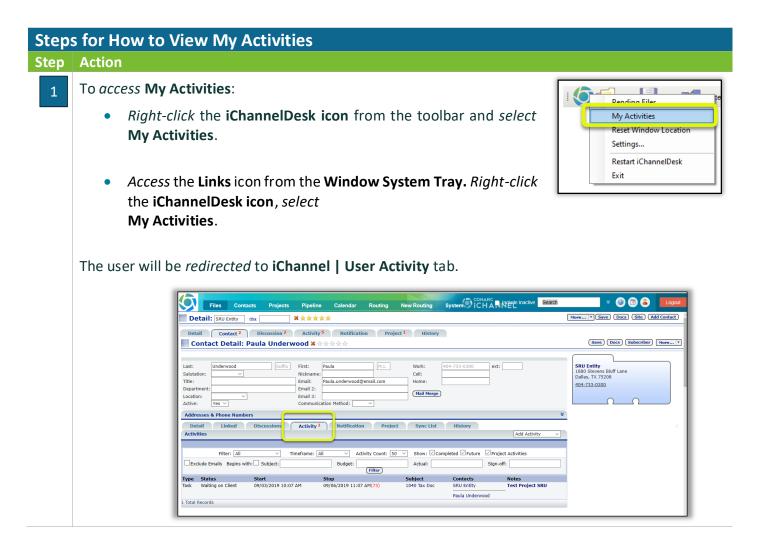


- 1. If you are logged into iChannel, *click* the **Folder** link will reload the browser window to the File Area of the Site selected.
- 2. *Click* Email icon will reload the browser to the Site's Email area.

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

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	Go to Support Suite
	🗐 🃁 🧊 🗐 🃁 App User Roaming	
- Trace files From here,	you can email your trace file (and config files) to iChannel Support	
	not have a support ticket and do not need one created e new support ticket O I have an existing ticket Ticket #:	
Notes (option	al):	
	Send	
	View trace file to Desktop	Re-register Redemption
Changes may require	a program restart. OK Cancel	Revert Apply