



**iChannel New Features v3.0 + (2021)**

- This document covers the highly anticipated features upgrades of iChannel v3.0 +.
- To access all new Features and Enhancements throughout iChannel, please click the following link for iChannel Release Notes
  - [v2.20+ iChannel Upgrade Coming Attractions](#)
  - [V3.0 iChannel Release Notes](#)
  - [V3.1 iChannel Release Notes](#)

**iChannel New Features v3.0 +**

**New iChannel Naming Standardization V3.0**

To better streamline terminology throughout iChannel, we have introduced a **New Naming Convention**. The terms used in the iChannel | Portal are now standardized for easy reference. The summary would be as follows,

New Term	Other Terms		
Channel	Rootsite		
Files	Documents		
Portal	Extranet		
Workflow	Projects		
Site	Entity	Company	Client
Primary Category	Channel	Portal Parent	Category Parent
Secondary Category	Topic	Portal Child	Category Child

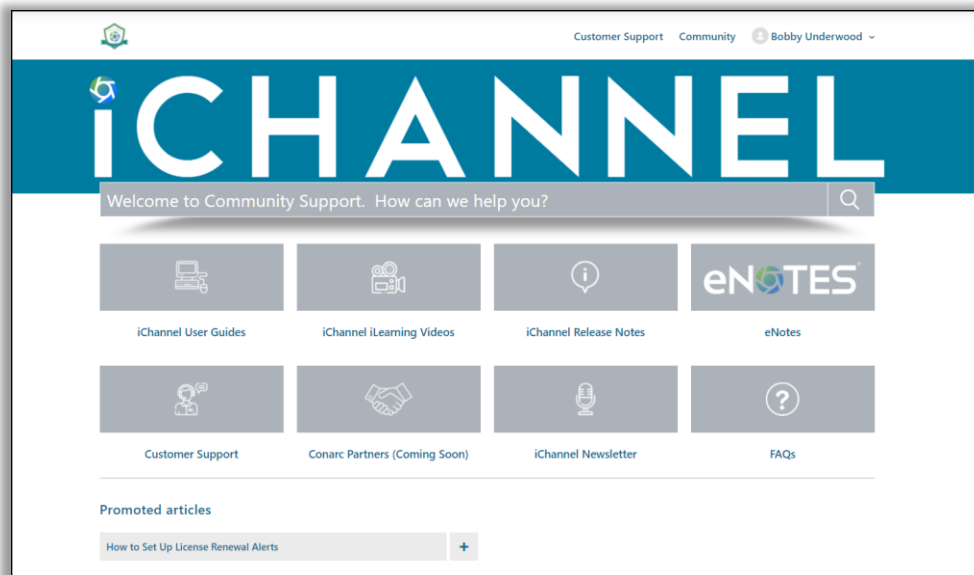
**New**

**iChannel Community Support and University**

New for v3.1 is **iChannel Learning Plans**. End-users can now do self-pace or refresher training by accessing our Learning Plans that support User Guides and iLearning video on key modules and topics of v3.1 iChannel.

- To learn more about iChannel Learning Plans, click the following link:

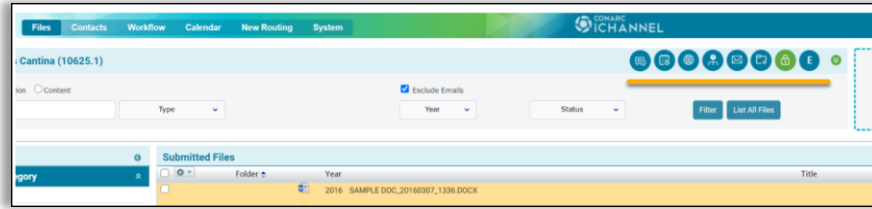
[iChannel Learning Plans](#)



**New**

**UI Enhancements  
iChannel Theme  
V2.20+**

Top menu icons are re-designed to match with the new iChannel theme.



Menu icons and respective tooltip texts for **Help & Release Notes** are updated.

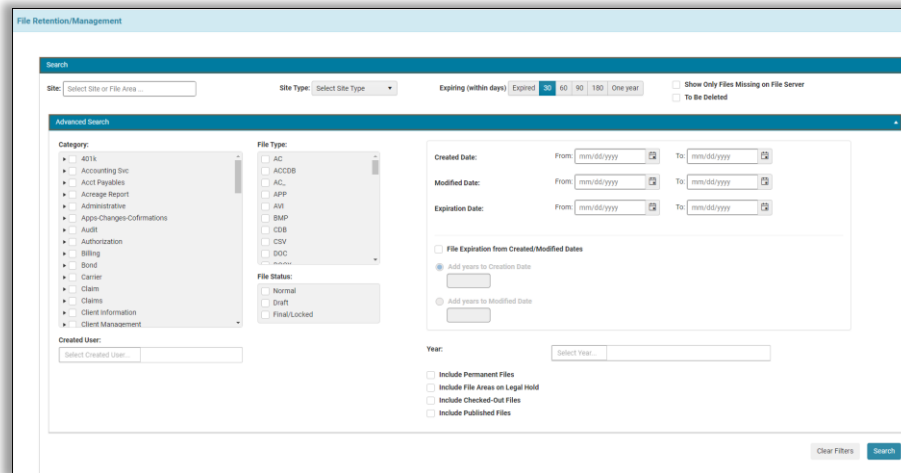


**New Module**

**Retention  
Module  
V2.20 +**

The new **iChannel Retention Module** provides clients with the ability to identify the parameters when archiving and setting retention policies on documents.

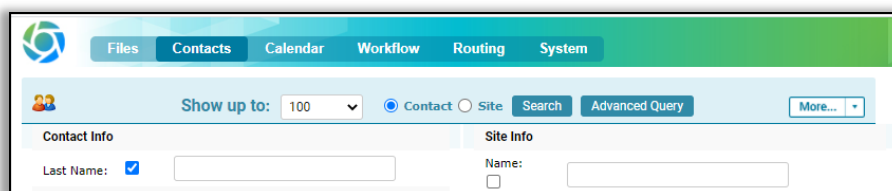
- For more information on the Retention Module, please click the following links: <https://support.conarc.com/Retention Module Job Aid> or [iChannel Retention Module iLearning video](#).

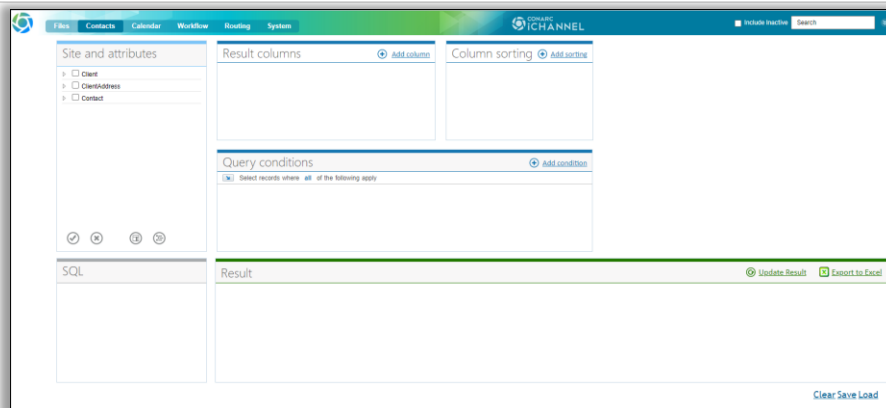


**New Module**

**Advanced Query  
V3.0**

The **Advanced Query (previously Report Query)** has been relaunched with new functionality. Advanced query module allows customize reporting for clients and contacts.





## New Email Templates V2.20 +




With v3.0 organizations can now customize **Email Templates**. Administrators can reference the 'Custom Email Templates' guide to learn more:

 [JOB AID iChannel Guide Email Template Customization](#)

### Custom Notification Emails

Previously, emails that were generated in iChannel only had the ability to use six (6) out-of-the box non-customized email notification templates. With this release, Clients can now request to customize up to 18 Notification Emails.

Below outlines the 18 notification templates for customization in iChannel:

-  6 of the 18 Custom Notifications Email templates can be modified by an organization without the engagement of iChannel Support. The six (6) templates are (version release date):
  - File Added to Portal [PublishDocumetPortal] v2.20.0
  - Password Change [PortalPasswordReset] v2.20.0
  - Welcome to Portal [PortalReady] v2.20.0
  - Projects [ProjectDetails] v2.20.3
  - Activities [ActivityReminder] v2.20.3
  - Activities Details [ActivityDetails] v2.20.3
-  12 of the 18 Custom Notification Email templates requires the engagement of iChannel Support due to their complexity in the configuration, in addition these 12 Custom Notification Email templates are not in the .Json file format.
-  The 12 templates are:
  - ICSFile
  - FileSubmissionReceipt
  - FileSubmissioinNotification
  - EmailTemplateBasic
  - DocumentLinkSecureKeyEmailTemplate
  - DocumentLinkAttachmentEmailTemplate
  - DocumentCheckoutEmailTemplate
  - DocumentCheckinEmailTemplate
  - ActivityEmail

- FileSubmissionEmailForInternal
- FileSubmissionEmail
- InternalDocumentsAdded

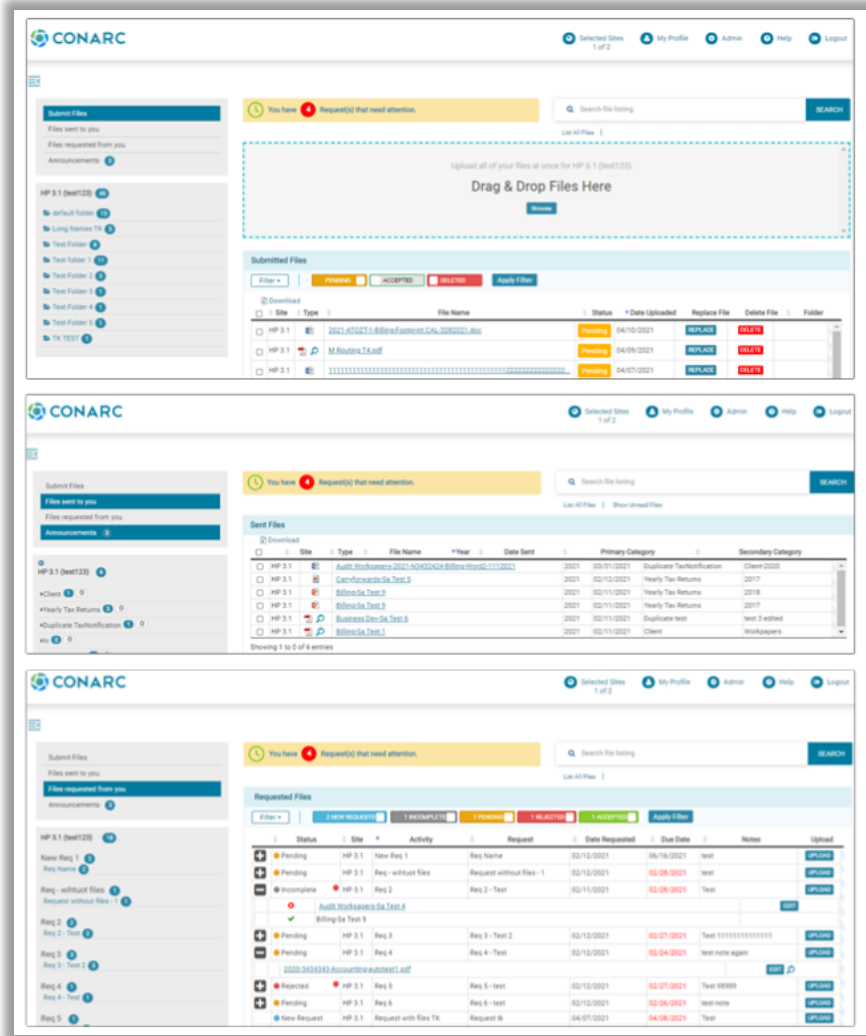
To customize and implement the 12 Customized Notification Email templates, please contact [iChannel Customer Support](#).

**New**

**iChannel Portal  
V3.1**

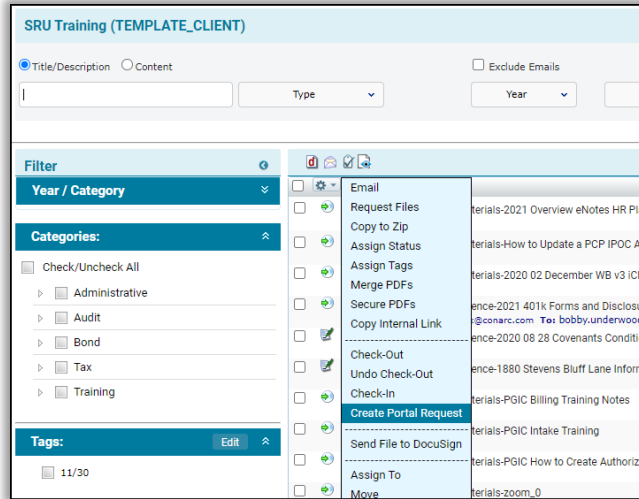
The **Portal** is fully redesigned with modern UI and enhanced functionality, facilitating an improved client experience.

[2021 Getting to Know iChannel Portal – Overview v3.1](#)  
[2021 Getting to Know iChannel Portal - Client Training v3.1](#)



**New**  
**iChannel Portal**  
**Create Portal**  
**Request**  
  
**V3.1+**

Users can now create a request to show on the portal for clients to return files back to their firm representative. User's select the **Create Portal Request** feature from the gear icon in the site file area. Once the request is made, the request will show on the Files Uploaded tab in the Portal.



**New Module**  
  
**CRM Security**  
**V2.20+**

**CRM Security** is a new feature that adds additional security settings for Projects, Activities, and other modules within iChannel. This is an additional service we provide. Please contact Lacy Magby (VP-Sales) if interested.

**What is CRM Security**

- iChannel takes security seriously. iChannel has always been able to restrict users from Client File Areas, but now organizations can restrict users from the Client CRM Details.
- CRM Security allows organizations the ability to restrict offices from seeing different office | clients, or for organizations who have an offshore team, where the organization would like to limit what clients they would have access to within iChannel.
- With CRM Security organizations can now grant access to files only and restrict client(s) CRM details information from view or restrict access from anything not even allowing users to pull a full client list if not given access.

[2021 iChannel CRM Security: How to Setup CRM Security](#)

**New Module**

**Workflow Rollover Tool V3.1**

**Workflow Rollover Tool** allows users to search for workflows from the previous year and to define how new workflows will be created in the following year(s), using a combination of data from the previous year workflow and the workflow templates.

This feature removes the burden of re-creating same workflow over every-year and allows to rollover all/any previous workflows within seconds.

**New Feature**

**iFetch V3.1**

Introducing **iFetch** a tool designed to allow users to quickly Open, Edit, and Save a file in Direct mode without the need to have iChannelDesk (ICD) running in the background. For now, it is compatible with Window 10 64bit only.

[2021 iFetch Installation and User Job Aid](#)

## iCHANNEL

### iFetch User Preferences

- 🔒 **Default iFetch Only** – your Organization has made a system-wide decision to set all user preferences to use **iFetch** 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)** – 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.
- 🔒 **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.

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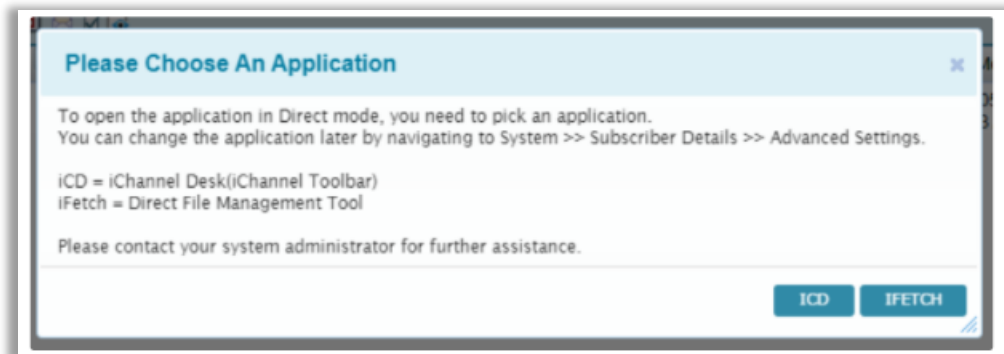


CONARC 2

With upgrading to iChannel v3.1 installation, an organization has to pick if they would like to exclusively use iFetch or CD for all their users TO OPEN FILES IN DIRECT MODE or use a combination (some users use iCD while others use iFetch - both can't be run simultaneously by a user TO OPEN FILES IN DIRECT MODE ).

If the organization opt for Both, then when a user opens a file in iChannel direct mode in a file area for the first time, user is prompted to select to open the file via either **iFetch** or **iCD**. The respective selection is persisted in advanced settings, which will be automatically picked, when direct mode is used next time.

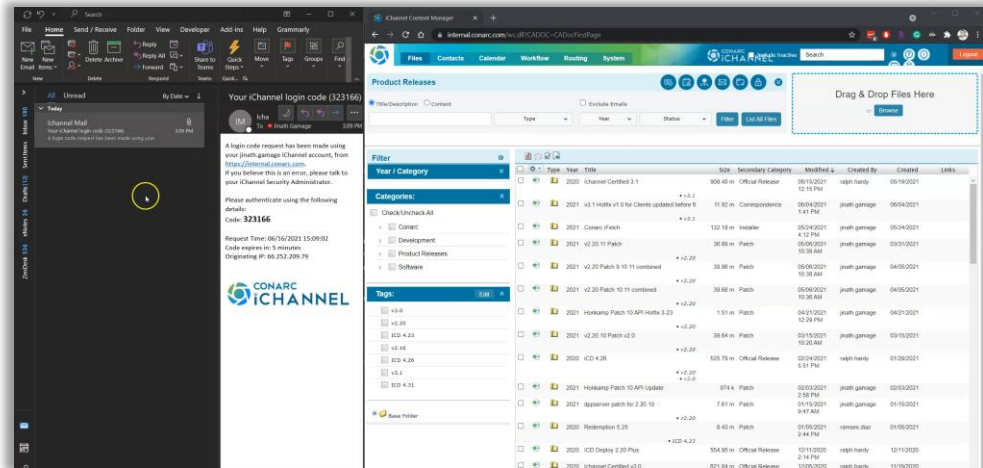
- The selection can be changed whenever required, through Subscriber details page by changing the respective advanced setting.



**New Enhancement**

**File Area Emails V3.1+**

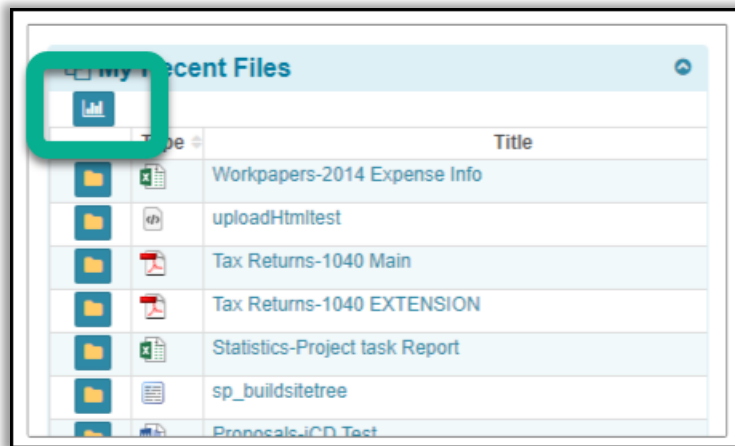
Now **emails can be drag and drop** from Microsoft Outlook to iChannel website, users are not required to run iCD or iFetch to perform the action. When emails are dragged and dropped into Channel upload boxes, the function would move a copy of the respective email to iChannel from the mailbox.



**New Feature**

**DocuSign History Report V3.1+**

New **DocuSign History Report** is added to the 'My Recent Files' Dashboard widget via a report icon. The report shows the history of documents sent through the DocuSign integration.



**New Enhancement**

**Password Hashing**

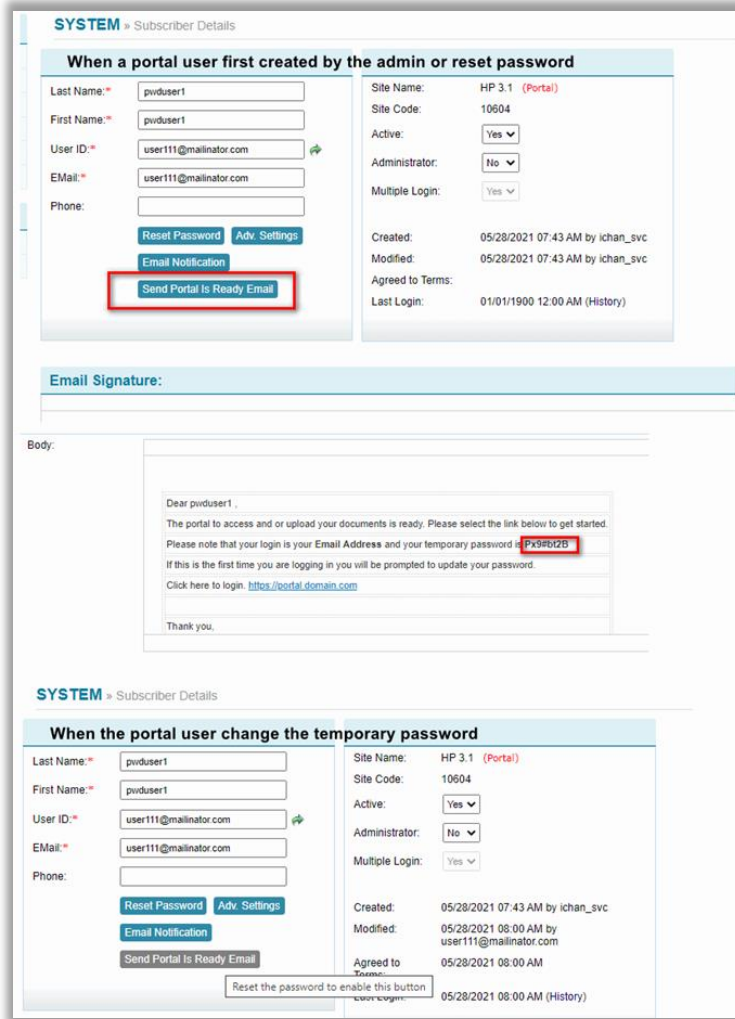
**Portal & Internal Sites V3.1+**

- Portal and Internal system passwords (PW) are hashed & stored in database
- Generates temporary PW & share the plain text PW with users

1. New subscriber creation
2. Forgot password function

- Users will be forced to re-set PW at **first login** → new PW is hashed & stored in database
- "Send Portal is ready Email"** option is enabled *only* in above 2 scenarios

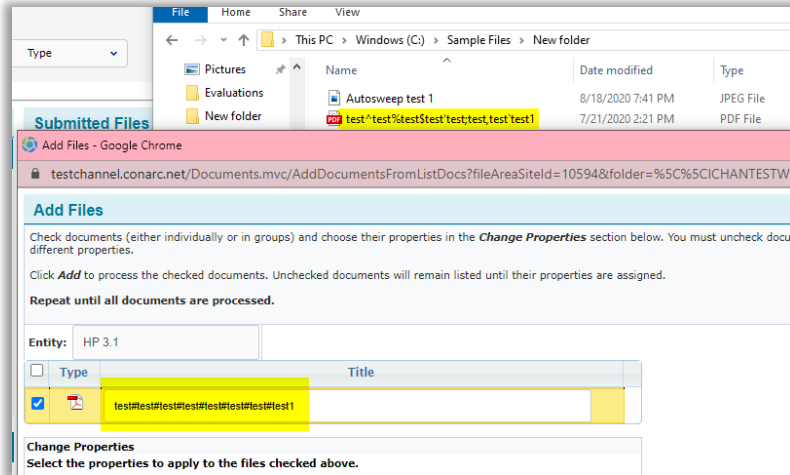




**New Enhancement**  
**Document Names**  
**V3.1+**

Incoming Documents Names are now Validated & Corrected

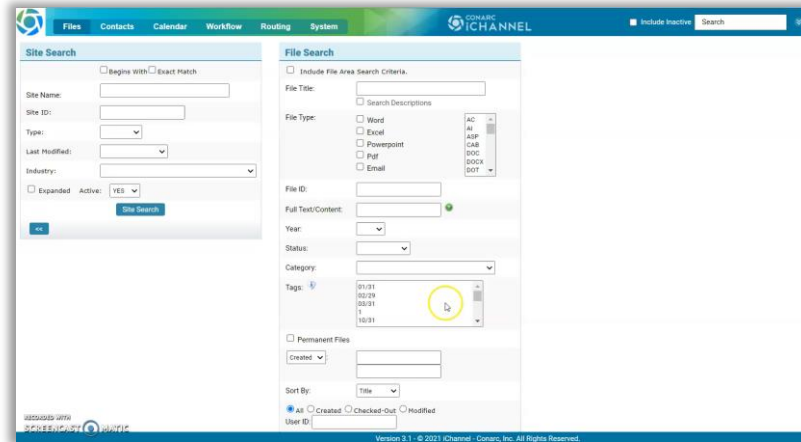
- 🌀 Invalid/bad characters are stripped from the file name before store in system
- 🌀 Such characters are replaced with #
- 🌀 Allowed Characters: **a-z A-Z 0-9 ! # ( ) \_ - + = { } [ ] . ~ @ &**
- 🌀 Points of Ingress: **Upload, Drag & Drop, Autosweep, ICD, Request Docs, Portal Upload, Routing, Other possible 3rd party interfaces**



**New Enhancement**  
**Search Files**  
**V3.1+**

Search Files by new Add File Tags in the File Area search.

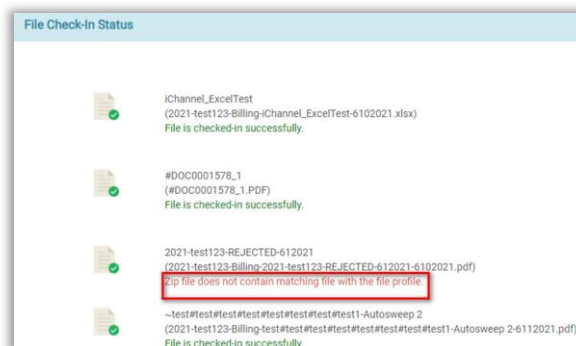
- File tags are displayed as a search parameter in the Files search section
- Limitation: Workflow/opportunity related tags are not reflected



**New Enhancement**  
**Check-in Multiple ZIP Files**  
**V3.1+**

Check-in multiple files in ZIP files.

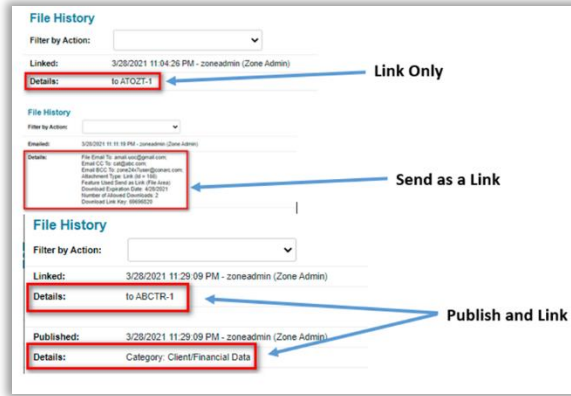
- System would not accept any invalid zip files with incorrect files
- File name is validated against **check-out file name and check-in file name**



**New Enhancement**  
**File History Report V3.1+**

File History Report has been enhanced.

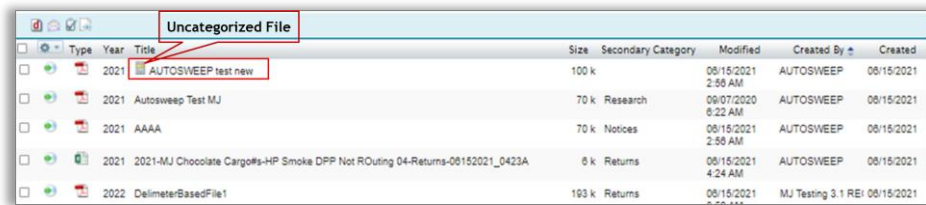
- History Records Details of File History section in File area is enhanced



**New Enhancement**  
**Autosweep V3.1+**

Autosweep Functionality

- Faster and instant functionality is provided (always running in backend)
- sync-up files with front-end and shows in respective file area instantly
- If categories are not applied → shows as Uncategorized file



**Recatalog Feature**

With v3.1 iChannel will not log support the feature: Recatalog as it has been deprecated.

**V3.1**

