



iChannel helps Frazier & Deeter LLC with Document Management

Frazier & Deeter LLC

Founded in 1981, Frazier & Deeter is the second largest independent CPA and Advisory firm in Georgia. They provide a wide range of tax, audit, accounting and advisory services that are tailored to address their client's specific challenges.

Frazier & Deeter has client-focused professionals who are knowledgeable, innovative, and committed to their client's financial goals. Because of this we remain a well-respected Atlanta CPA and Advisory firm, and are proud to be:

- One of Atlanta's Top 10 Accounting Firms as noted in Atlanta Business Chronicle.
- Recipient of the Practical Accountant, Practice Innovation Award for the past two years for our commitment in taking the lead for developing new or improved services, and promoting efficiency in the practice of public accounting.
- A silver medalist of Top American CPA Firms and an Accounting All-Star by Bowman's Accounting Report and Inside Public Accounting, two of the industry's leading publications.

Industry	CPA and Advisory
Issue	Document Management
Solution	iChannel Document Management
Result	Revolutionized the management of workflow



When challenged to find a document management solution, Aaron Spitalnick, IT Director for Frazier & Deeter LLC, did his homework. “We looked at many of the solutions provided by the major software vendors in the Accounting Industry (CCH, Thomson, etc.) as well as several from outside our industry (including WorldDox and SharePoint). IChannel was unique in the sense that it was built to work with a company’s existing framework and procedures and is not tied into a specific industry so you can use it for your entire organization.” Spitalnick added, “Most other solutions required us to change our file structures or change the flow of our work, but the flexibility of iChannel enabled us to add it to our workflow without having to reinvent the processes that have made us so successful.” Conarc’s implementation team worked closely with Frazier & Deeter to understand these workflows and determine how to implement iChannel to complement them. “The ease of getting iChannel up and running combined with excellent technical support allows me to focus on other IT projects which is critical to the growth of our organization.”

Another key differentiator of iChannel is that each document is given a logical name and the file structure mirrors the structure on the network. “This was important to me when we implemented it because if we decided that we did not like the product we would have an immediate exit strategy”. Since iChannel was implemented in 2006, “It has improved consistency, efficiency and communication between all departments in our organization,” stated Spitalnick. iChannel is not just designed to handle your client documents, it can also help you manage your, internal management, vendor, education, projects, committees, individual employees, and departmental documents.



“iChannel has revolutionized the way in which we manage our workflow. It allows our associates to efficiently manage multiple phases of engagements simultaneously as well as work independently off-site. It has also reduced to bare minimum incidences of lost “paper” files. The unfortunate side effect has been significant weight gain for many of our associates due to a substantial decrease in the number of trips to the file room!”

**James Frazier CPA
Founding Partner
Frazier & Deeter, LLC**

Spitalnick described how iChannel has allowed Frazier & Deeter, LLC to be significantly more flexible with employees and more available to their clients. “We have Auditors on engagements in Europe logging into iChannel and servicing clients in the United States and vice versa. We have been able to retain key employees that have moved out of state or have family situations where they have to work from home during the week. The work gets done because all of the necessary information to service a client is scanned into iChannel and available for them to do their work. As gas prices continue to increase, I expect to see more and more people working from home, iChannel gives our employees access to the information necessary to do so.” I Channel architecture allow remote users to easily access iChannel via any secure access method implemented (VPN, Remote Desktop, CITRIX, etc.).

Conarc’s technical support is very responsive and handles the complicated upgrades that other vendors expect the client to implement. “Because other vendors are not available outside of regular business hours (when our users are off the system and we could perform upgrades), if there is a complication with the client performing the upgrade it is down until the next day when the technical support department shows up. Conarc is actively involved in upgrades and if you run into an issue they are working with you to resolve them; you are not down during hours of operations and losing chargeable hours.” Conarc is committed to provide their clients with full cycle support to minimize down time during updates, network changes, maintenance, etc.

Spitalnick went on to say, “Conarc also does a terrific job listening to their clients and implementing features that we think will make their product better.” Enhancements and new functionality are continually added to the product based on customer needs & feedback.

“Even though we selected iChannel as our Document Management solution, we continue to look at the competitors on the market and are consistently pleased with our decision” said Spitalnick. “As our company continues to grow, it is refreshing to know that we have a solution that can perform under our ever increasing demands” says Spitalnick.

iChannel is a product for Enterprise Content Management with a focus on helping managing a client relationship. Conarc, Inc. was founded in 1997, based in Atlanta and is privately held.