

CCH iFirm Learning Portal

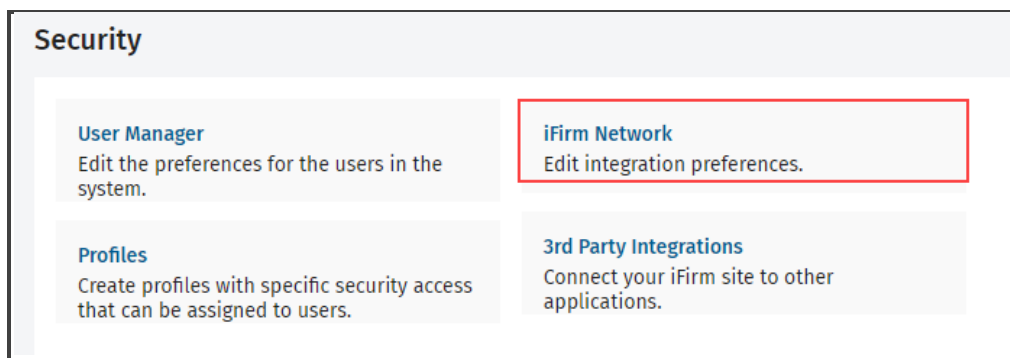
Setting Up Integration with TaxWise Desktop

The ability to integrate CCH iFirm with your tax software saves you time in loading contact information into CCH iFirm. You can integrate with TaxWise desktop to perform a bulk export of contact information, as well as printing tax returns directly to the Client Portal.

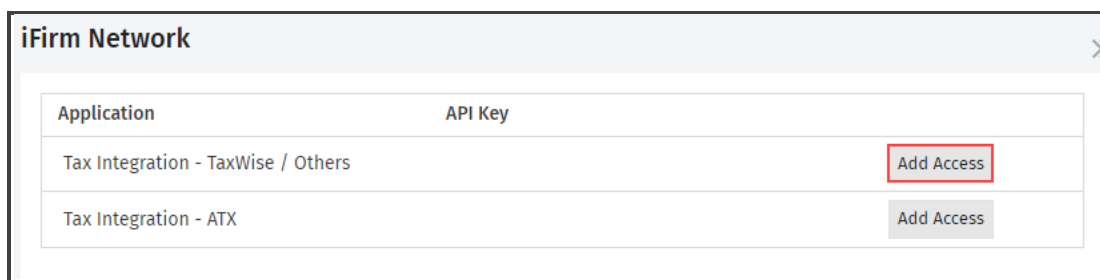
Obtaining API Key

To establish the integration with TaxWise, you will first need to obtain the API key from CCH iFirm. The API key is a unique number that allows you to integrate your data in CCH iFirm to TaxWise. To generate your API Key (Authorization Token) for TaxWise, log in to your CCH iFirm account as the admin user.

1. From the Admin Home page, click **Security**. CCH iFirm displays the Security page. Click **iFirm Network**.



2. CCH iFirm displays the iFirm Network page. Under Application, locate Tax Integration – TaxWise/Others and click **Add Access**.



3. CCH iFirm displays the API Key on the iFirm Network page. This is your access key to CCH iFirm from TaxWise. Copy the number as you will need it to establish the integration.

iFirm Network		
Application	API Key	
Tax Integration - TaxWise / Others	4061C5968D13F66729E78A1F4EC25378	Remove Access
Tax Integration - ATX		Add Access

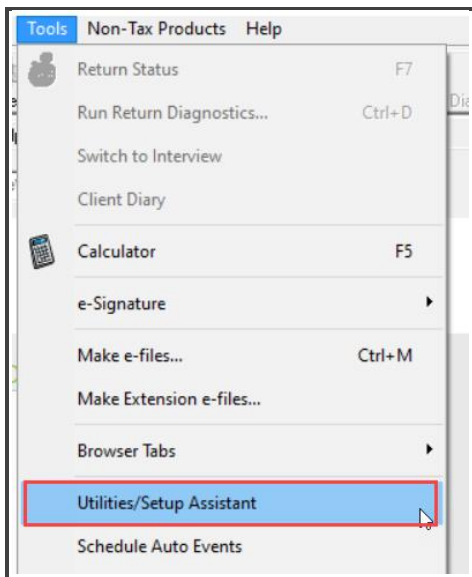
TaxWise Integration

Once you have obtained the API key you can proceed with establishing the integration.

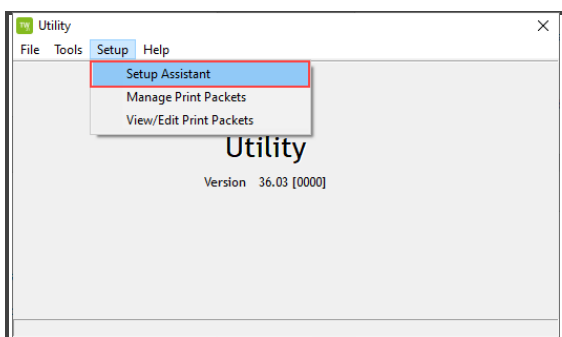
i If you are going to use the bulk export to transfer your contacts from TaxWise, it is recommended that you do that first.

To setup the Integration between TaxWise Desktop and Client Portal:

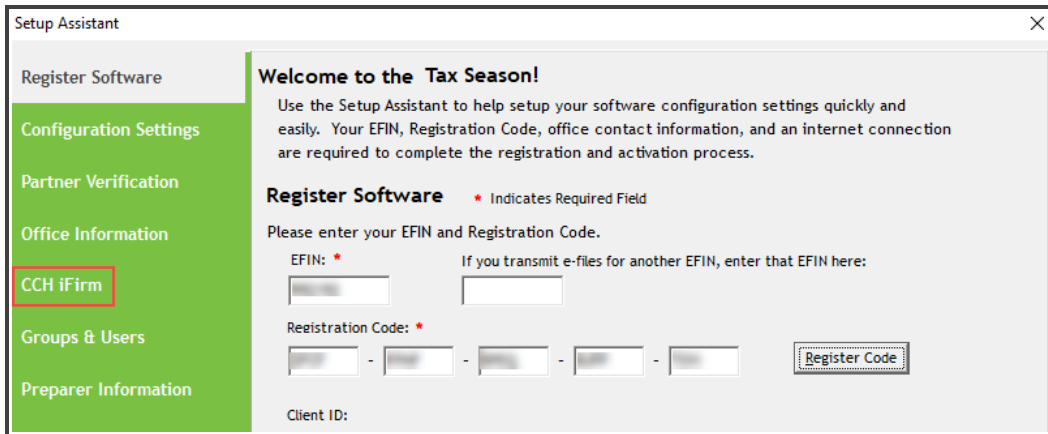
1. In TaxWise, as the Admin user, click the **Tools** menu. Select **Utilities/Setup Assistant**.



2. From the Utility dialog box, click the **Setup** menu, and select **Setup Assistant**. TaxWise displays the Setup Assistant dialog box.

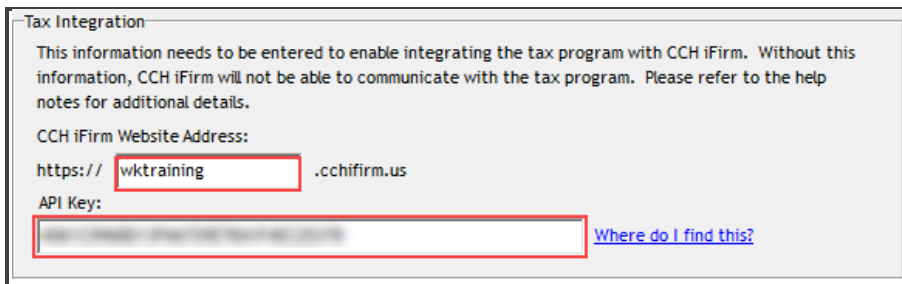


3. Click the **CCH iFirm** tab.



The screenshot shows the 'Setup Assistant' window with the 'Register Software' tab selected. The left sidebar contains a green menu with the following items: 'Register Software', 'Configuration Settings', 'Partner Verification', 'Office Information', 'CCH iFirm' (highlighted with a red box), 'Groups & Users', and 'Preparer Information'. The main content area is titled 'Welcome to the Tax Season!' and includes instructions for using the Setup Assistant. Below this, the 'Register Software' section is active, featuring a legend for required fields and input fields for 'EFIN', 'Registration Code', and 'Client ID'. A 'Register Code' button is also visible.

4. In the Tax Integration section, enter your CCH iFirm Website Address and API key.



The screenshot shows the 'Tax Integration' section of the software. It contains a text block explaining the need for website address and API key information. Below this, there are two input fields: 'CCH iFirm Website Address' and 'API Key'. The website address field contains 'https:// wktraining .cchifirm.us', with 'wktraining' highlighted by a red box. The API key field is empty and also highlighted by a red box. A blue link labeled 'Where do I find this?' is located to the right of the API key field.

5. Once you enter this information, click **Save and Close**. You can now exit TaxWise.