

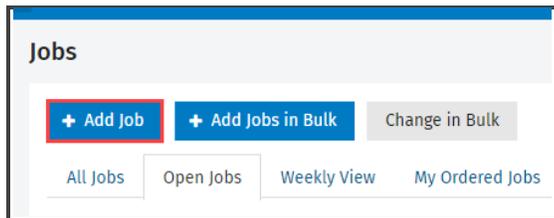
CCH iFirm Learning Portal

Add Jobs

Jobs and job management are key areas in CCH iFirm Practice Manager. You can create jobs manually or in bulk, set up recurring jobs or set up jobs to automatically generate. You can create checklists before creating jobs and attach checklists as part of the job creation process.

Create Jobs Manually

1. Click **Jobs**. CCH iFirm displays the Jobs page. Click **Add Job**.



2. CCH iFirm displays the Add Job page. Complete the job details starting with identifying the client. Once you have completed the necessary job details, click **Save**.

[🔗](#) For additional details about adding jobs manually, click [here](#).