Learn About Contacts Module

CCH iFirm Contacts is a database in which you can record details on all your contacts whether they are clients, prospects, leads, suppliers, or groups. Contacts is a core module in CCH iFirm, and all the other modules run off the Contacts database. so it is important that you set up Contacts before you start using the other modules.

Contacts can be imported:

- Directly from ATX and TaxWise Desktop
- Using a CSV File
- Added manually

Review the table below for the settings available for the Contacts module.

Options	Description
General Settings	Use to establish settings to automatically assign client codes to new contacts, the option to display the country as part of the address, and the option to customize the label of the custom address section. By default, this is labeled Additional Addresses.
Entities	Use to add business entities to classify your clients. The default list includes C-Corporation, S-Corporation, Partnership, Individual, or Sole Proprietorship.
Client Types	Use to classify your clients based on industry type. You can create additional categories for industry types and subtypes.
Dynamic Fields	Use to create custom fields for gathering additional information that would not be part of your clients' standard tax information.
Note Categories	Use to create a custom list of note categories.

For additional information on establishing contact settings review the corresponding lesson *Edit Contact Settings* in the CCH iFirm Learning Portal.

Access Contacts Module

To access the Contacts module, you must be logged in as a General User with access to one of the following Security Roles:

- Contacts – View Only
- Contacts – View, Add, and Edit Contacts
- Contacts – Edit Contacts in Bulk
- Contacts – Archive and Delete Contacts

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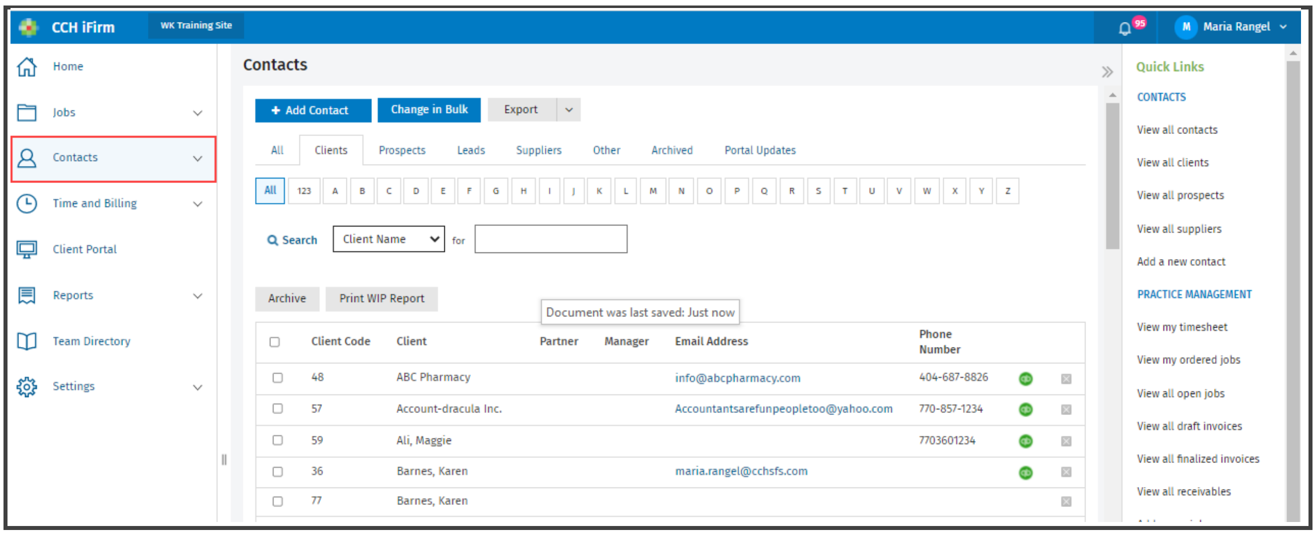
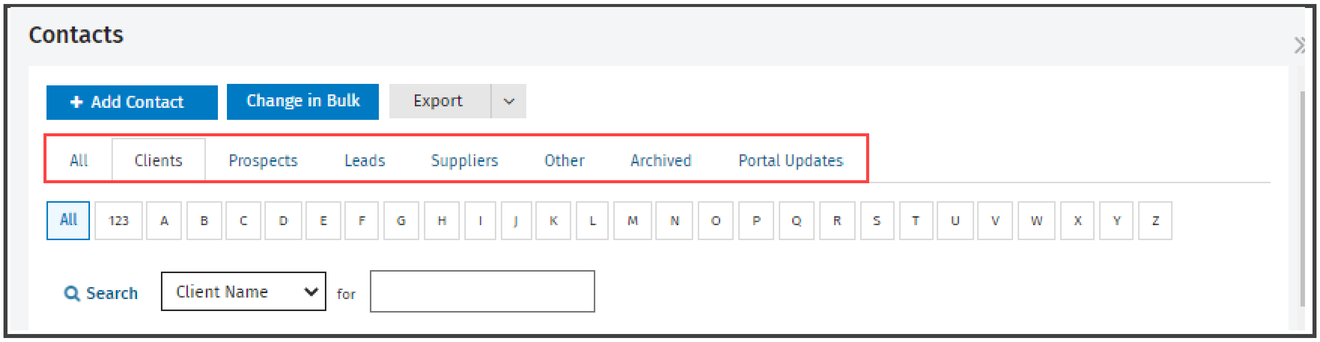
Once logged in as a General User, you will see the Contacts Module on the left side of the screen.



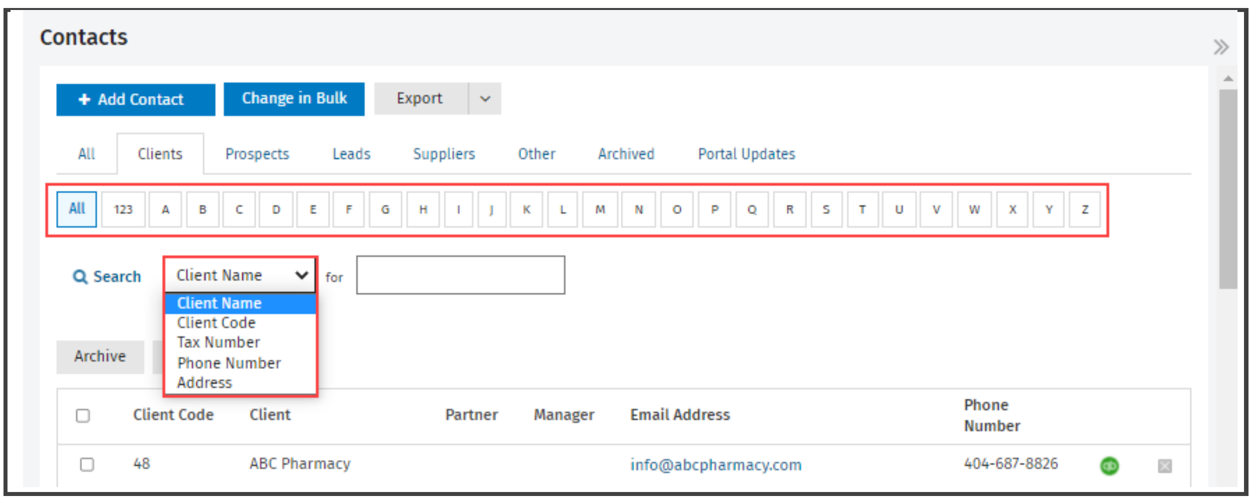
Across the top of the Contacts page, you see the contacts broken up into the following category tabs:

- **All Contacts** – List all contacts in CCH iFirm
- **Prospects** – List contacts where the contact type is listed as Prospect or Prospect & Supplier.
- **Leads** – List contacts where the contact type is listed as Lead or Lead & Supplier.
- **Suppliers** – List contacts where the contact type is listed as Supplier, Client & Supplier, Prospect & Supplier, or Lead & Supplier.
- **Other** – Lists contacts where the contact type is listed as Other.
- **Archived Contacts** – List contacts that have been archived.
- **Portal Updates** – Lists contacts that have made changes to their contact information via portal that need to be reviewed and approved.

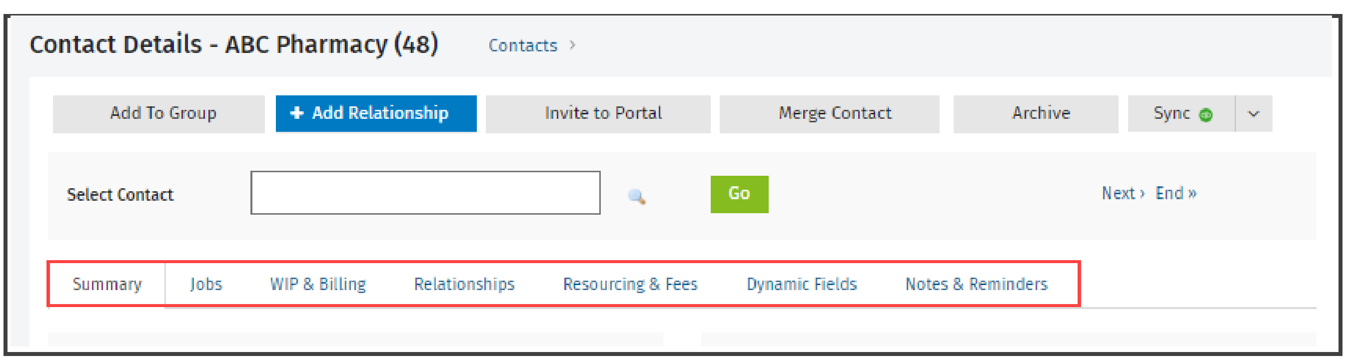


You can sort your contacts based alphabetically or by using the Search option. This search option allows you to search by :

- Client Name
- Client Code
- Tax Number
- Phone Number
- Address



From the contact details page, you have access to all aspects of this client. The contact details page consists of several tabs.



The table below outlines what can be found in each tab.

Tab	Description
Summary	Access a summary of the contact's details, including their name, code, and contact details.
Jobs	Access the jobs currently open for the client, as well as their last 10 closed jobs. This tab is only visible if your subscription includes Practice Manager.
WIP & Billing	Access the client's current WIP, draft invoices, last 10 invoices, aged receivables, and recent receivable transactions . This tab is visible only if your subscription includes Practice Manager.
Relationships	Access the contact's groups and relationships.
Resourcing & Fees	Access the client's settings for resourcing, automatic fees, and charge out rates. This tab is visible only if your subscription includes Practice Manager.
Dynamic Fields	Access the contact's dynamic fields.
Notes & Reminders	Access the contact's notes and reminders.