CCH iFirm Learning Portal

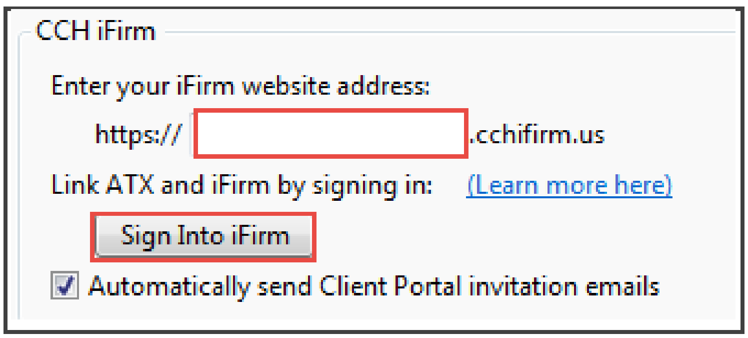
ATX Integrated Features

You can sync your CCH iFirm account with your ATX tax software to take advantage of integrated features. These include exporting contact information in bulk, printing completed tax returns directly to the Client Portal, and managing Practice Manager jobs in ATX. First, sync your CCH IFirm account with ATX.

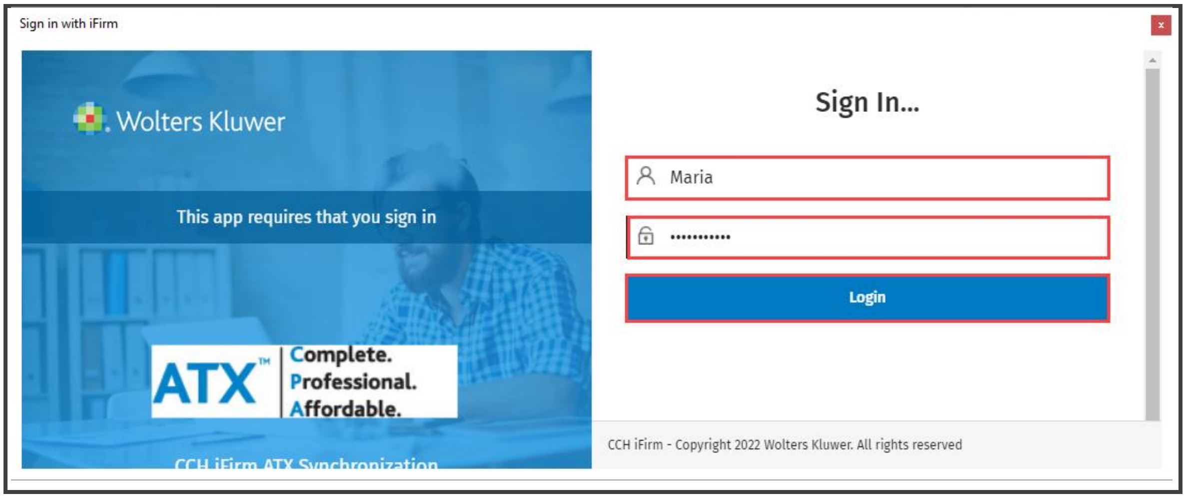
Syncing with ATX

To sync CCH iFirm with ATX:

1. Inside ATX, from Return Manager, click **Preferences**.
2. On the Return Manager tab, type your unique CCH iFirm URL in the field provided.
3. ATX enables the Sign Into iFirm button. Click **Sign Into iFirm** to complete the process.

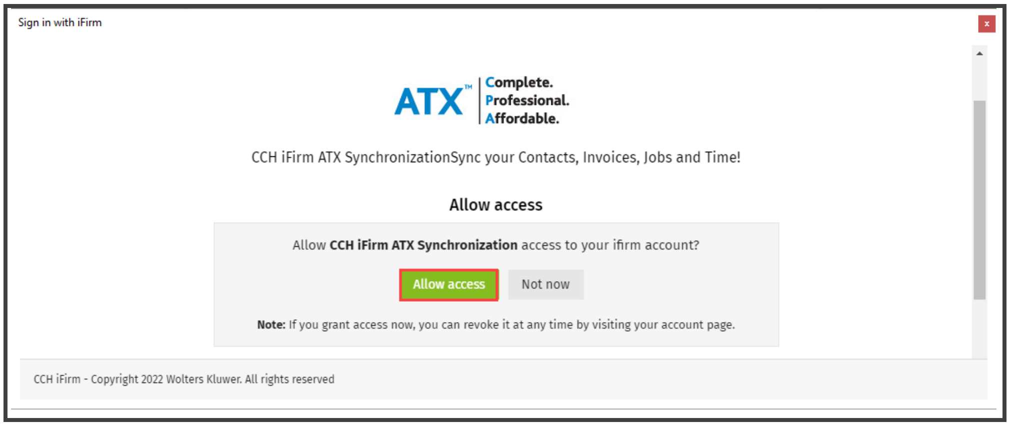


4. ATX displays the Sign in with iFirm window. Type your username and password in the fields provided and click **Login.**

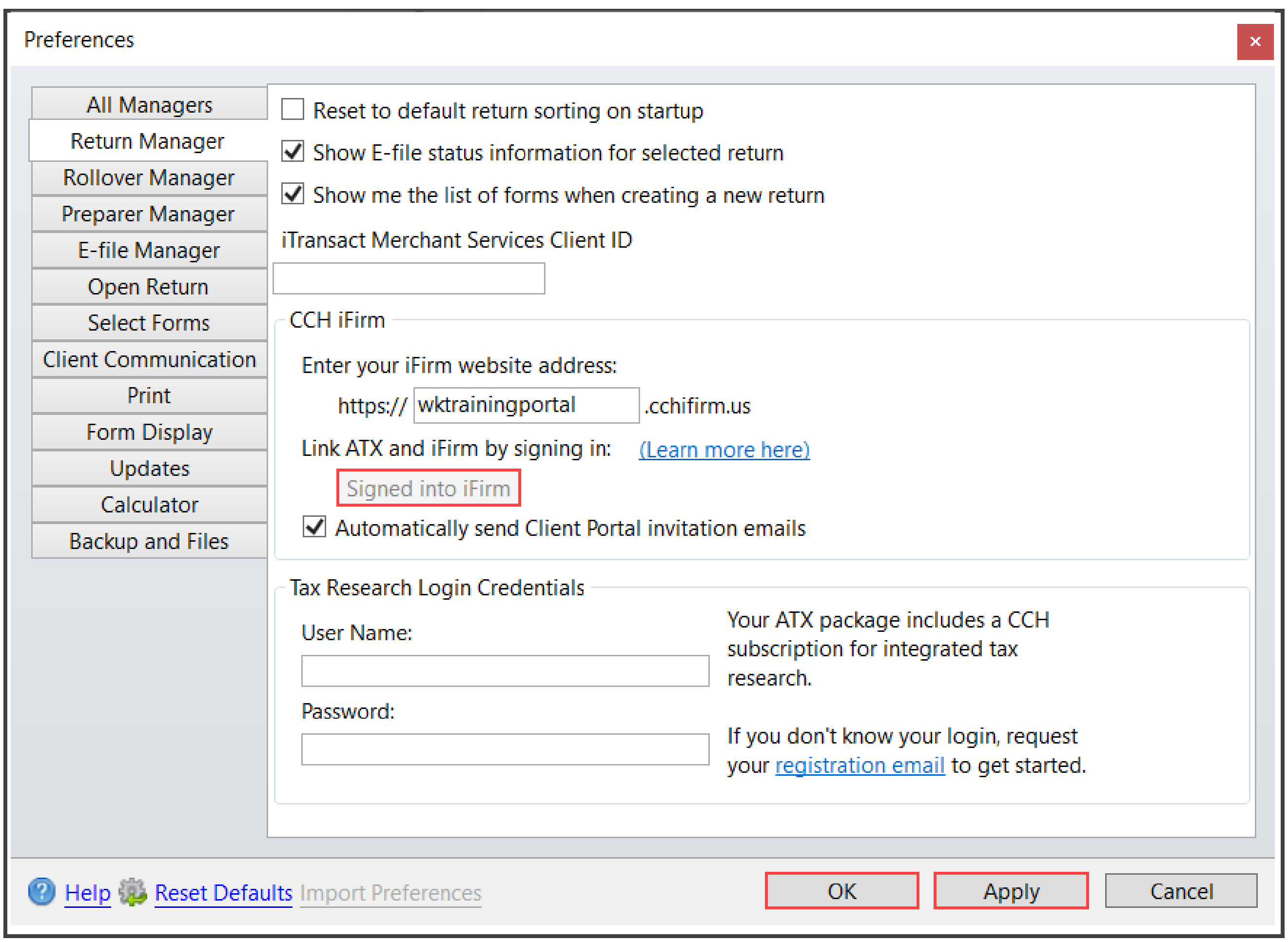


Do NOT use your CCH iFirm Admin credentials in this step. Use the general (non-admin) user you created to sync with ATX.

5. ATX requests that you allow access to CCH iFirm to sync the two programs. Click **Allow Access** to allow access.



6. ATX Returns to the Preferences dialog box. The button now reads Signed into iFirm and is greyed out. Click **Apply** and then **OK** to exit the Preferences dialog box.

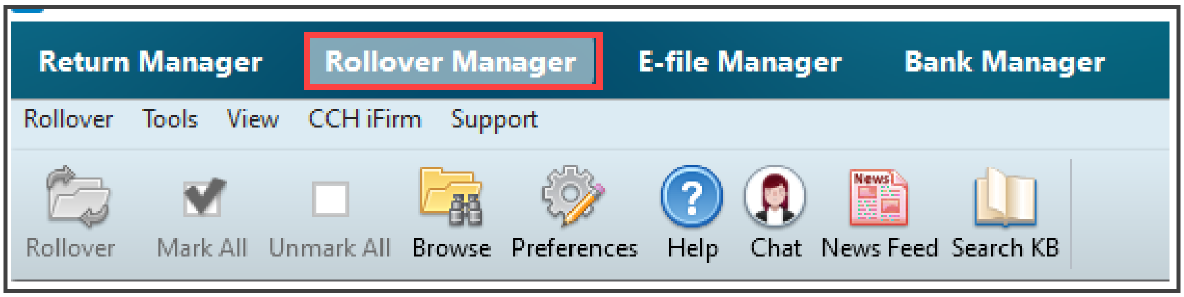


Export Contacts in Bulk

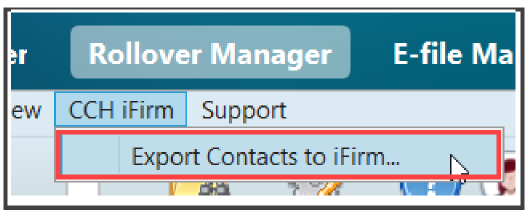
After syncing your CCH iFirm account with ATX, you can export contact information from your prior year tax returns to create contacts in CCH iFirm.

To export your clients from ATX:

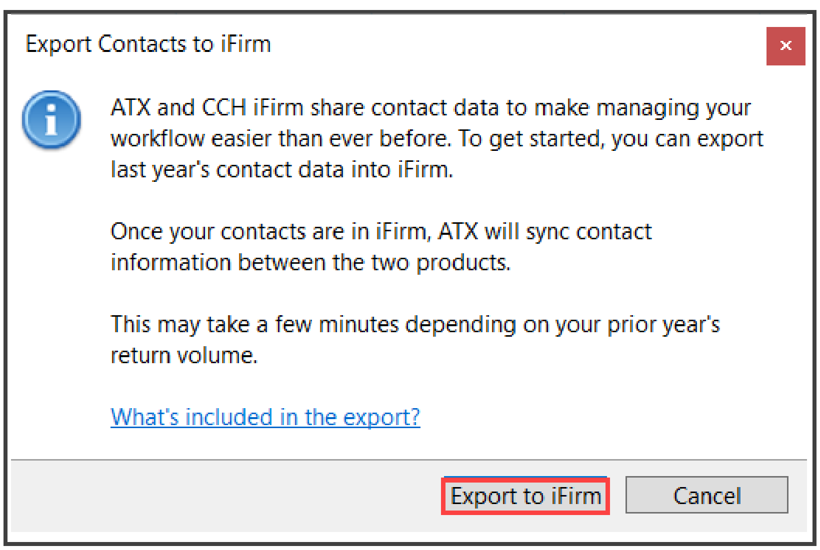
1. Click **Rollover Manager**.



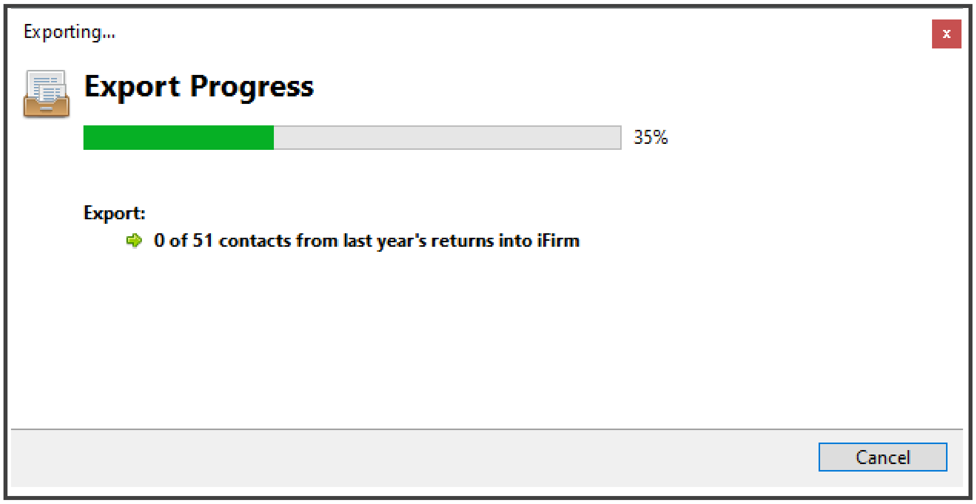
2. From the CCH iFirm menu, click **Export Contacts to iFirm**.



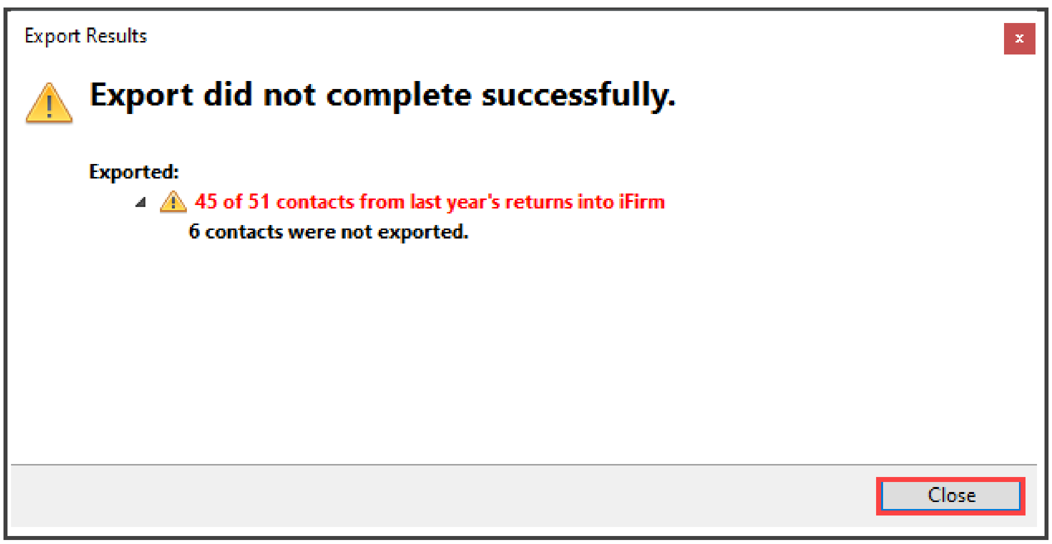
3. ATX displays the Export Contacts to iFirm dialog box. Click **Export to iFirm**.



4. ATX displays the **Exporting** dialog box.



5. When the process is complete ATX displays the Export Results dialog box. Click **Close**.

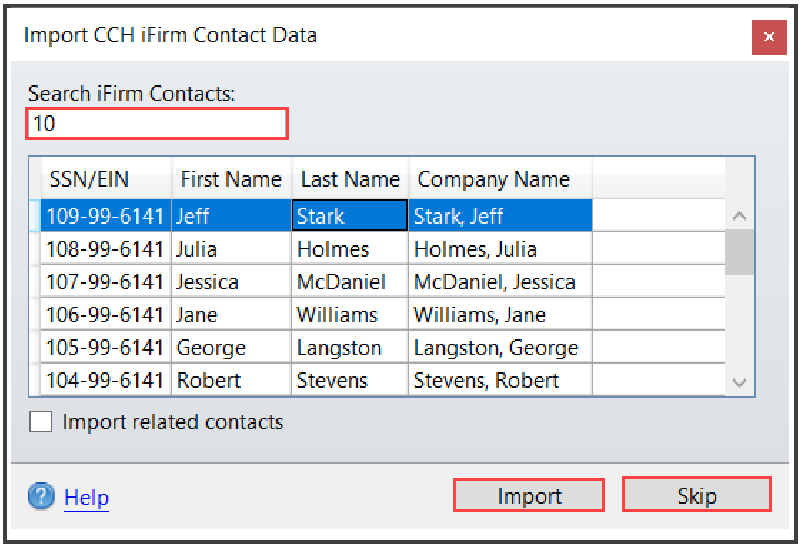


Syncing Contact Information

After creating contact records for your clients in CCH iFirm, you can pull data into the tax return, or update changes to contact details from within ATX. When you open or close a return, ATX displays a dialog box, allowing you to indicate whether you want to sync information with CCH iFirm.

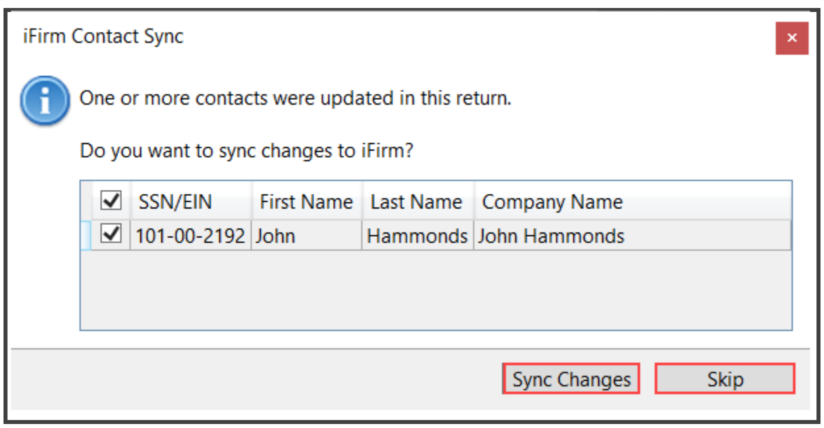
When you start a new return, ATX displays a dialog box where you can begin entering a Social Security Number to locate an existing contact record.

1. Select the contact and click **Import** to load the information into the return, or **Skip** to enter information manually.



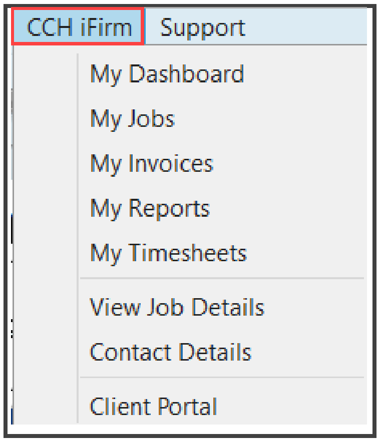
When you close a return, ATX also prompts you to indicate whether you want to update the contact record in CCH iFirm to reflect any changes to contact details entered on the return.

2. Click **Sync Changes** to update the record or click **Skip** if you do not want to update the CCH iFirm contact record.



CCH iFirm Menu

From the ATX Return Manager, or from within an open return, you can access tools from the CCH iFirm menu to assist you in managing your clients and jobs.



Review the chart below for details about each menu item:

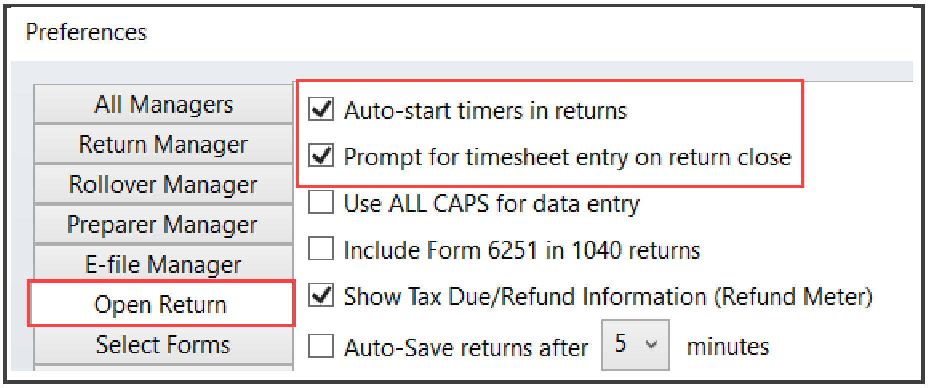
Option	Description
My Dashboard	Opens CCH iFirm displaying the Dashboard view.
My Jobs	Opens CCH iFirm displaying your created jobs list.
My Invoices	Opens CCH iFirm displaying your created invoices.
My Reports	Opens CCH iFirm displaying your list of reports.
My Timesheets	Opens CCH iFirm displaying your timesheet entries.
View Job Details (in an open return only)	If a job has been created for the return, ATX opens a window displaying the details for that job.
Contact Details (in an open return only)	If a contact has been created in CCH iFirm for this client, ATX opens a window displays the contact details for this client.
Client Portal	Opens CCH iFirm displaying the Client Portals page.

Working with Timesheets

If you use CCH iFirm Practice Manager, you can enable timers to help you track the amount of time you spend preparing returns. You can also access your CCH iFirm timesheet from within ATX, increasing your efficiency in adding this time to your timesheet.

To enable timers:

1. In ATX, click **Preferences**.
2. On the Open Return tab, select the checkbox to enable timers to automatically start when you begin working on a return.



3. You can also enable ATX to prompt you to enter the time on your timesheet when you close a return.

After making changes, remember to click **Apply** to save these changes.

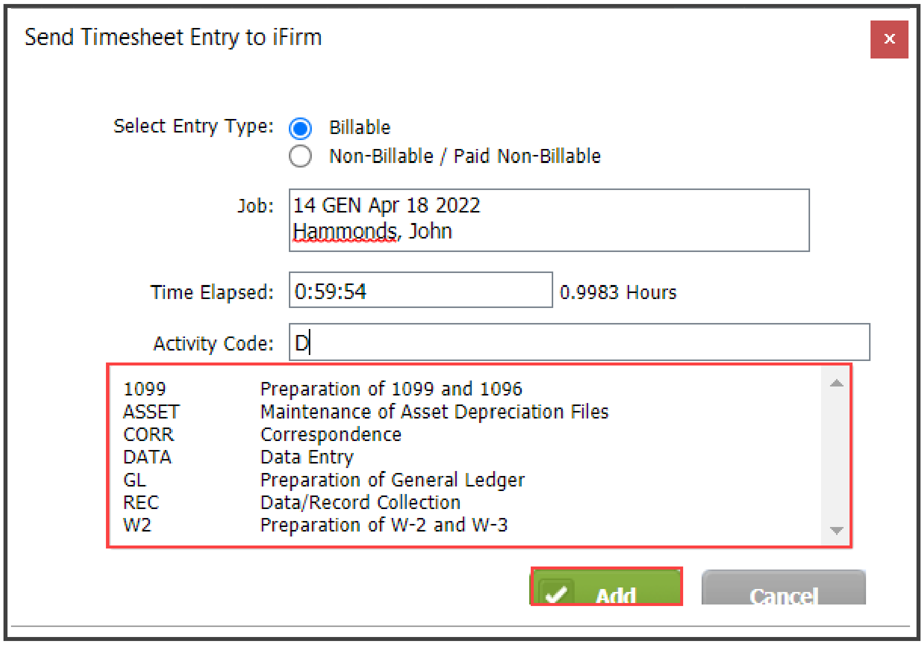
In an open return, ATX automatically tracks the time you spend working in that return. You can pause and restart the timer as needed, and ATX automatically stops the timer when you close the return.

Recording Time on Timesheets

Once you are ready to report the timesheet in CCH iFirm:

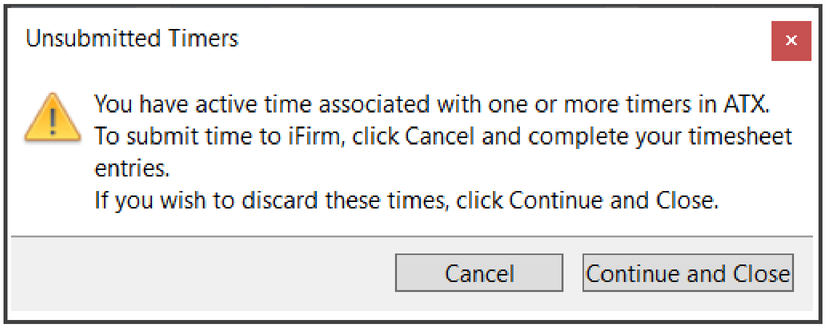
1. Click the **Timesheet** icon next to the timer.

ATX displays the Send Timesheet Entry to iFirm dialog box.



2. Select whether this time is considered billable or non-billable.
3. Begin typing the client's name in the **Job** field to locate and select the job to which this time applies.
4. Begin typing in the **Activity Code** field to display the list of available codes and select the appropriate code.
5. Click **Add**.

If you have tracked time in a return, and have not added it to your timesheet, when you close the return, ATX displays the following dialog box:



6. Click **Cancel** to stay in the return and complete the timesheet entry using the previous steps. Click **Continue and Close** to exit the return without submitting the timesheet entry.