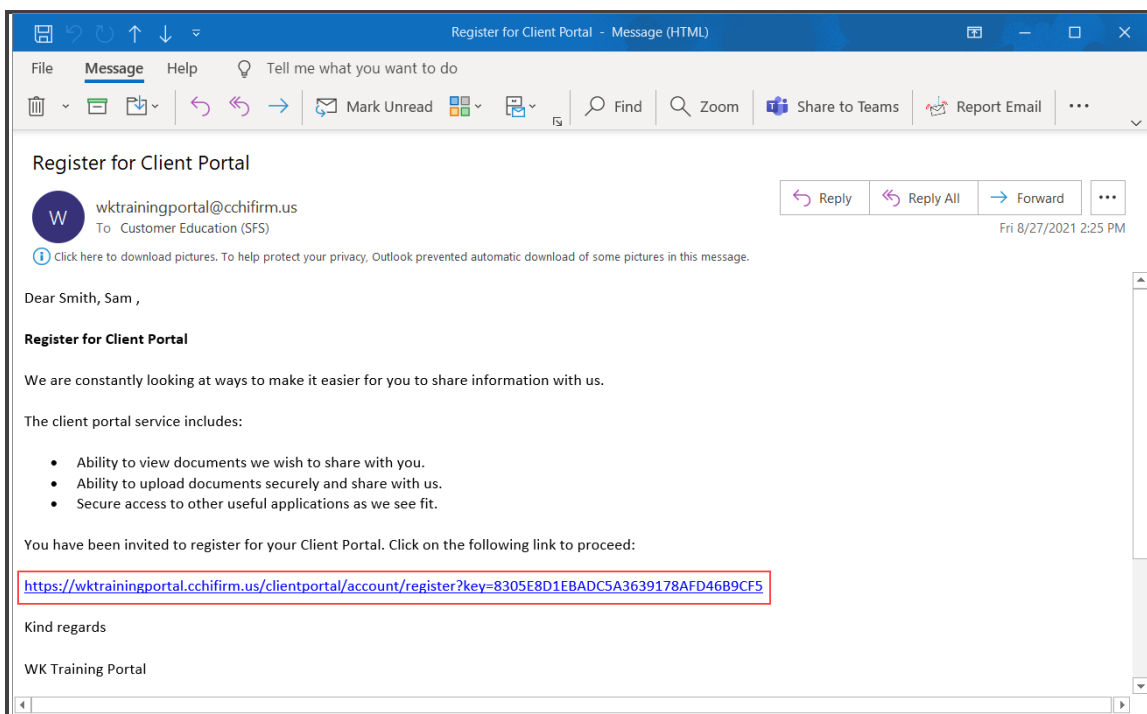


CCH iFirm Learning Portal

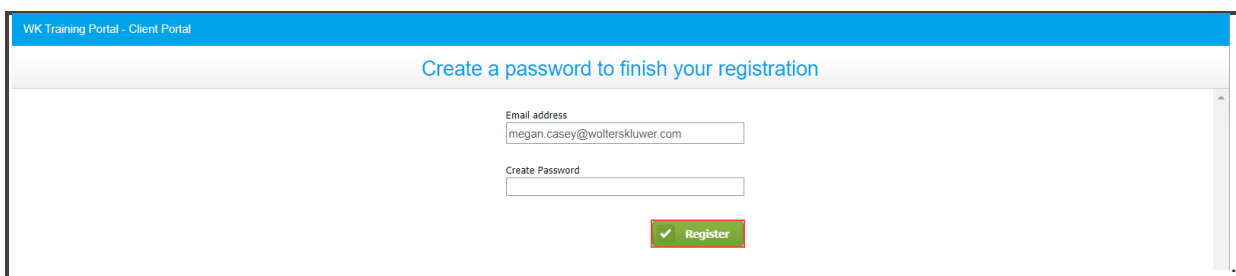
Client Portal: What Your Clients See

The Client Portal makes it more efficient for you to send documents to your clients, and easier for clients to update their contact information, view documents, or send documents to the tax office.

1. Once you invite a client to use Client Portal, they receive an email containing a link to access their private portal. Instruct your clients to click this link.



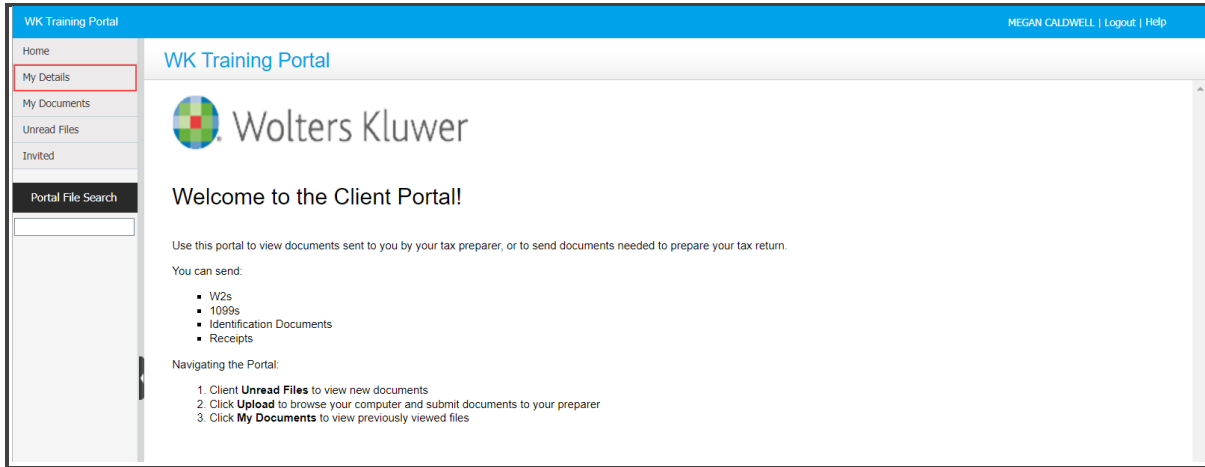
2. Once your client clicks the link, their Internet browser displays the Login screen. Instruct your clients to create a password, and then click **Register**.



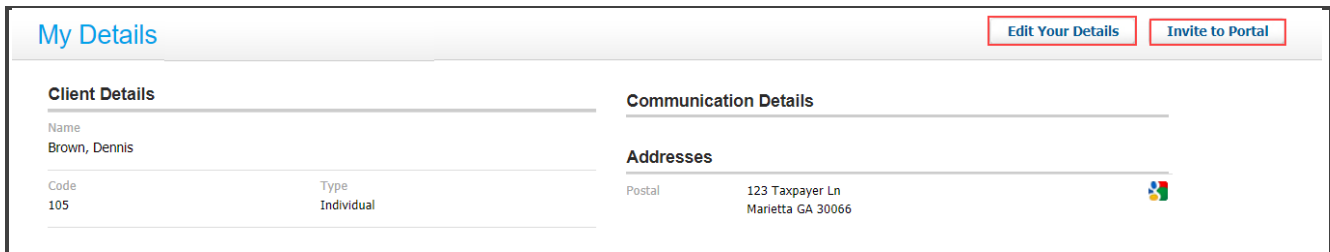
If a client forgets their password, they can click the **Forgot Password** link on the login screen to reset their password.

CCH iFirm Client Portal displays the Home page. Any content you added when creating your Home page can be accessed from this page.

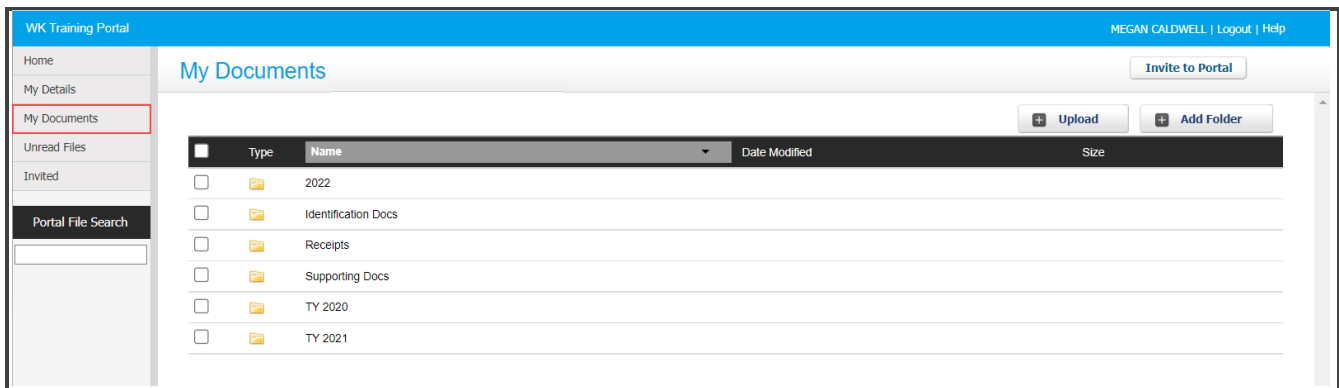
3. Next, your client can click **My Details** to review their current contact information.



4. On the My Details page, depending on your settings, clients can click **Edit Your Details** to update contact information, or click **Invite to Portal** to invite others in their tax family to use the Client Portal.



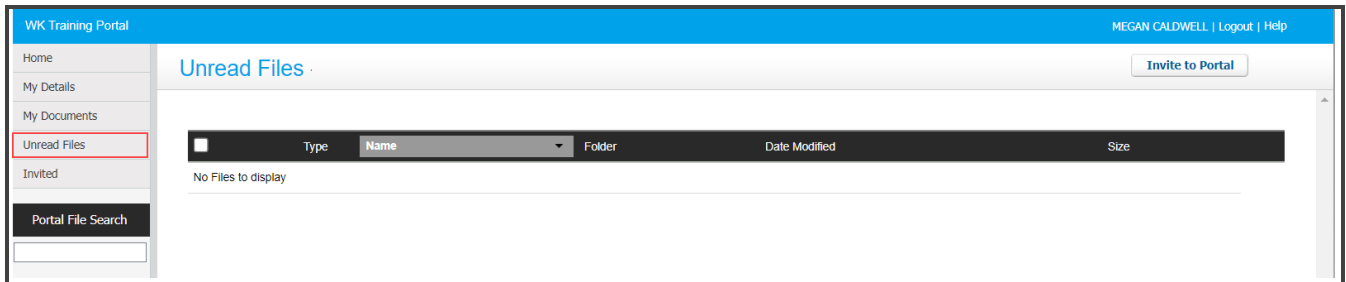
5. Next, clients can click **My Documents**. Here, any folders you created will display, along with any documents that have already been viewed by you or your clients.



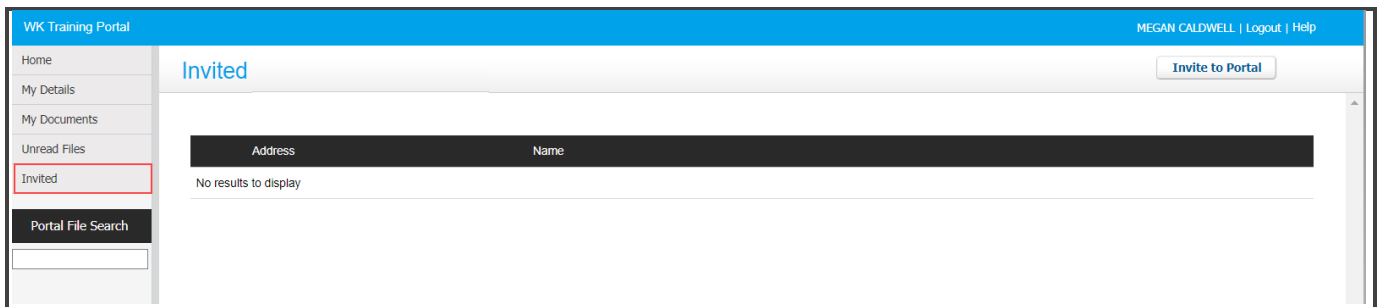
6. If a client needs to send a document to you, they can click the **Upload** button to browse their computer and upload that document. They can also click **Add Folder** to create a new folder here.



7. Next, if your client clicks **Unread Files**, they can view any new documents you have sent. Once these have been read, Client Portal automatically moves them to the My Documents tab.



8. If the client clicks the **Invited** tab, they can review any additional users they have invited to this portal.



9. Finally, if a client needs to locate a specific file within their portal, they can use the Portal File Search field to find the file.

