

# CCH iFirm Learning Portal

## Manually Adding Contacts

As a general user, if you have the **Contacts – View, Add, and Edit Contacts** security role, you can add a new client manually using the **Contacts** menu.

1. From the **Contacts** page, click **Add Contact**. CCH iFirm displays the Add Contact page.

The setup for a new contact consists of four tabs. The table below describes the information you will complete in each tab.

Name	Description
<b>Details</b>	Use to complete contact name, address and other contact information. This is where you identify the contact as a client and select the entity type.
<b>Profile</b>	Use to complete additional details, such as tax year information, client type and categories, and client history information.

Name	Description
<b>Billing</b>	Use to add any client-specific interest rates, rather than global rates. This billing section is available only when your site also has Practice Manager.
<b>Additional Addresses</b>	Use to add alternative address information.

2. Once you complete any applicable information for this contact, click **Save**.
3. CCH iFirm displays the Contact Details page. Use the tabs to review information for the contact, answer Dynamic Fields questions, and add Notes or Reminders for this contact.
4. Use the buttons along the top to add this contact to a group, create a relationship, or invite this client to use the Client Portal.

**Contact Details - Hammonds, John (1)** Contacts >

[Add To Group](#)
[+ Add Relationship](#)
[Invite to Portal](#)
[Merge Contact](#)
[Archive](#)

Select Contact  [Go](#)

[Summary](#)
[Jobs](#)
[WIP & Billing](#)
[Relationships](#)
[Resourcing & Fees](#)
[Dynamic Fields](#)
[Notes & Reminders](#)

**Client Details** [Edit Details](#)

Name  
Hammonds, John

Code 1      Type Individual

Date of Birth  
Sep 25 1978 (Age 43)

SSN 123-45-6789      Tax Year End January      Annual Accounts Month None

**Billing Details** [Edit Details](#)

Invoice/Statement Delivery By Email      Charge Interest No

**Address** [Edit Details](#)

Postal  
623 Miller Rd  
ROME GA 30165-

**Current Position**

- There is 1 open job for the client with a total WIP balance of 0.00.

**Recent Notes** [Add Note](#)

There are no notes for this client.