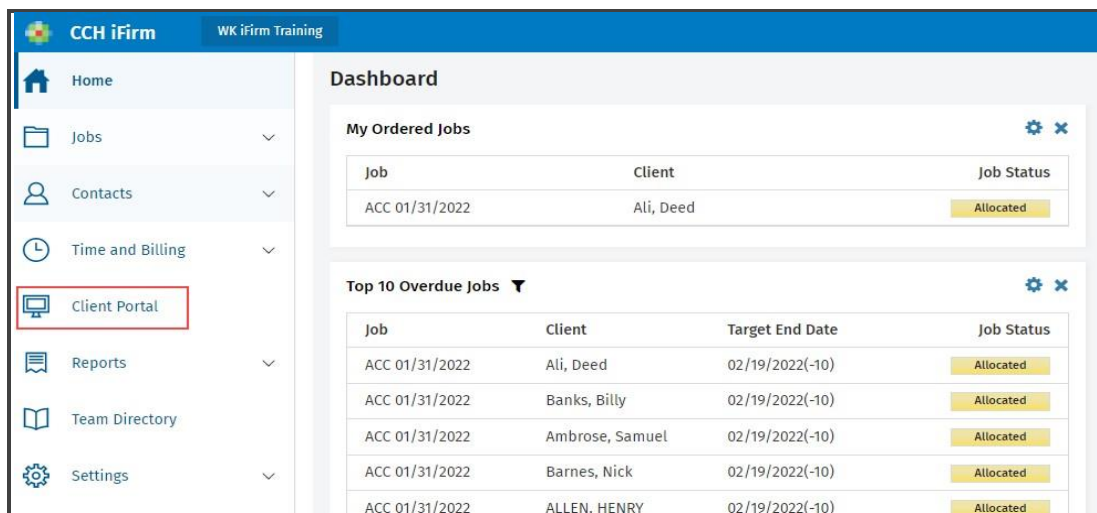


CCH iFirm Learning Portal

What is CCH iFirm Client Portal

Client Portal is a module of CCH iFirm, which you can use to create individual portals for your contacts. These portals allow you and your clients to securely share documents, making tax preparation more convenient and efficient.

When the **Client Portal** module is activated in your CCH iFirm site, it displays as a navigation icon on the left.

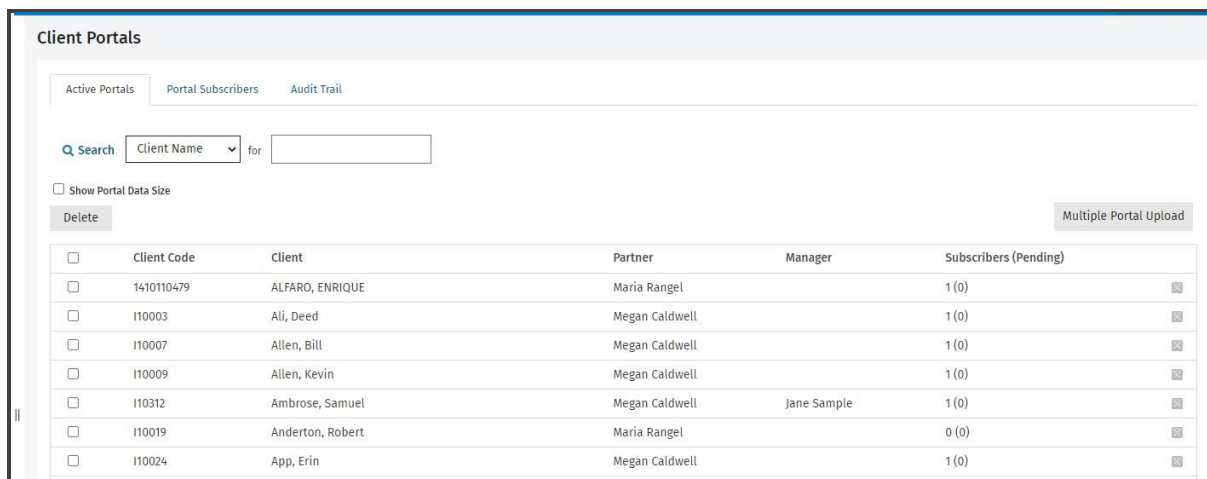


The screenshot shows the CCH iFirm dashboard. On the left sidebar, the 'Client Portal' icon is highlighted with a red box. The main dashboard area displays 'My Ordered Jobs' and 'Top 10 Overdue Jobs' tables.

Job	Client	Job Status
ACC 01/31/2022	Ali, Deed	Allocated

Job	Client	Target End Date	Job Status
ACC 01/31/2022	Ali, Deed	02/19/2022(-10)	Allocated
ACC 01/31/2022	Banks, Billy	02/19/2022(-10)	Allocated
ACC 01/31/2022	Ambrose, Samuel	02/19/2022(-10)	Allocated
ACC 01/31/2022	Barnes, Nick	02/19/2022(-10)	Allocated
ACC 01/31/2022	ALLEN, HENRY	02/19/2022(-10)	Allocated

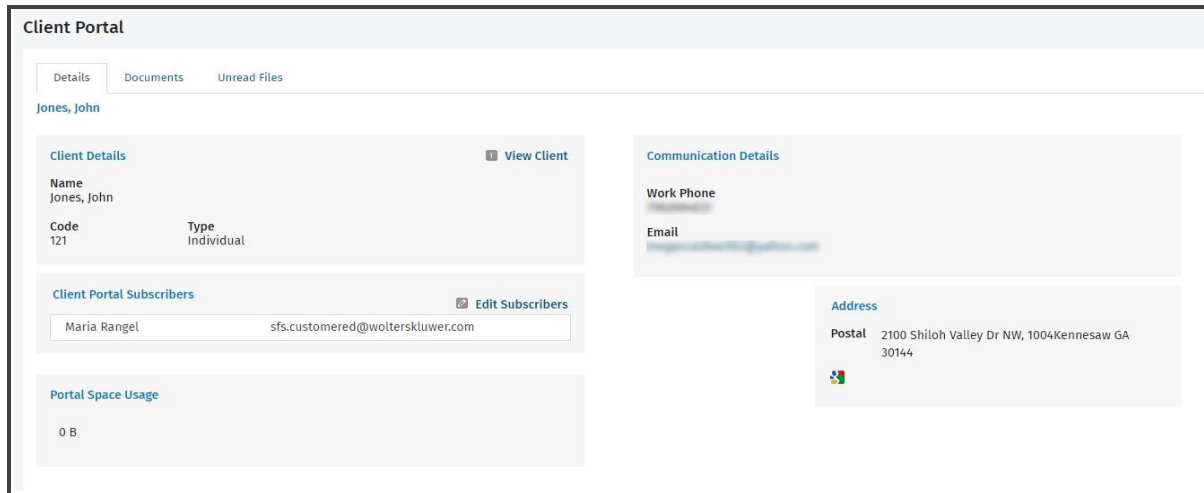
The **Client Portals** page lists all the portals you have activated by sending invitations to your clients.



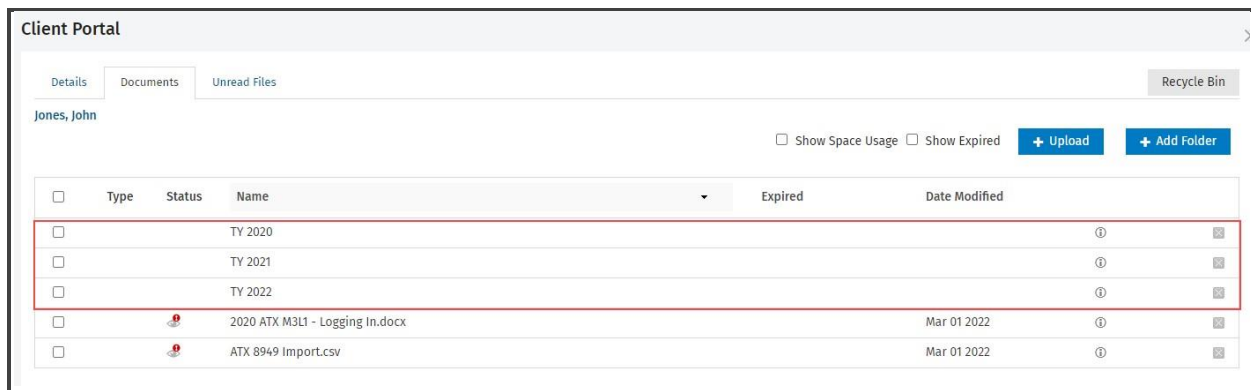
The screenshot shows the 'Client Portals' page. It includes a search bar, a 'Show Portal Data Size' checkbox, and a 'Delete' button. The main table lists the following data:

Client Code	Client	Partner	Manager	Subscribers (Pending)
1410110479	ALFARO, ENRIQUE	Maria Rangel		1 (0)
I10003	Ali, Deed	Megan Caldwell		1 (0)
I10007	Allen, Bill	Megan Caldwell		1 (0)
I10009	Allen, Kevin	Megan Caldwell		1 (0)
I10312	Ambrose, Samuel	Megan Caldwell	Jane Sample	1 (0)
I10019	Anderton, Robert	Maria Rangel		0 (0)
I10024	App, Erin	Megan Caldwell		1 (0)

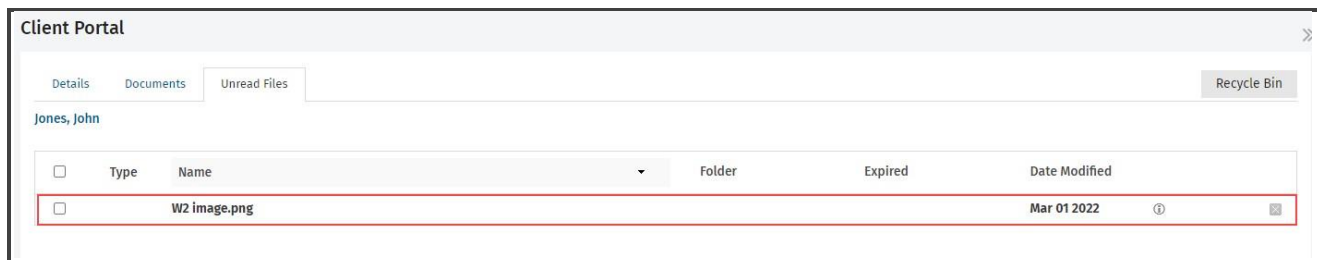
In addition to sharing and viewing documents, you can also quickly access your clients' contact information, and clients have the option to update this information through the portal. This gives clients an effective way to ensure you always have their most up-to-date contact details.



By creating folders within your clients' portals, you can organize documents, making them easier to locate when needed.



Finally, Client Portal includes an Unread Files section. This displays any new files your clients have sent, for easy access. Once you view the unread file, CCH iFirm automatically moves it to the Documents tab.



i For more information on editing your Client Portal settings, inviting clients to use Client Portal, and using Client Portal, please review the other lessons in this Learning Portal.