

CCH iFirm Learning Portal

Set up Job Status

To enable your firm to replicate your internal workflow processes, you can customize the status options that appear for each job type. You can add your own custom job statuses, rename existing job statuses and select the applicable statuses. The number of statuses that you allocate to each job type determines the progression of each color band.

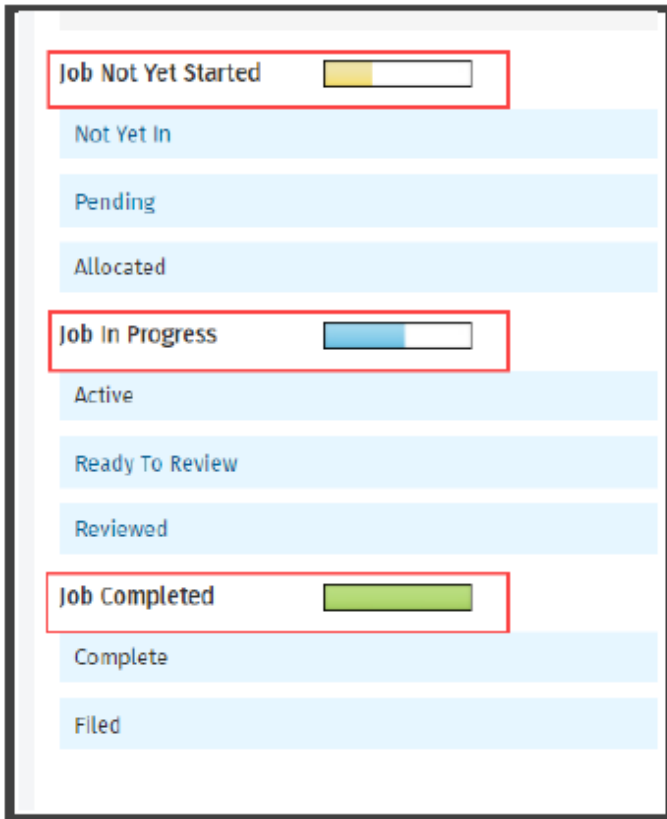
The default job statuses cannot be renamed, re-ordered or deleted because they are used to track the progress of a job through the system.

The table below provides details about the default statuses.

Status	Description
Allocated	Use when resources are assigned to a job.
Active	Use when you begin working on a job.
Complete	Use once you have finished working on a job.
Filed	Use once the job has been filed to the appropriate filing agency.

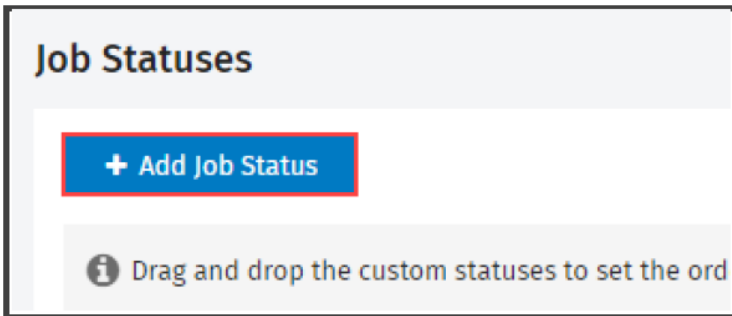
In addition to the default job statuses, there are additional statuses listed:

- Job Not Yet Started (yellow)
- Job in Progress (blue)
- Job Completed (green)



To add a job status:

1. From the **Admin Home** page, click **Job Statuses**. CCH iFirm displays the Job Statuses page. Click **Add Job Status**.



2. CCH iFirm displays the Add Job Status page. Type the name of the job status. Select the job types you want to assign to it. Click **Save**.

Add Job Status

Name

Assigned Job Types

- 1099
- Accounting
- Amendment - Business
- Amendment - Ind
- Audit - Business
- Audit - Individual
- Audit - Workers Comp
- Bookkeeping
- Bus Registration
- Consulting
- Financial Statements
- General
- Imported WIP
- Payroll

Select All Select None

 Cancel

CCH iFirm displays the new status last on the list. You can change the order of statuses by dragging and dropping as needed.