

CCH iFirm Learning Portal

Setting Up Recurring Jobs

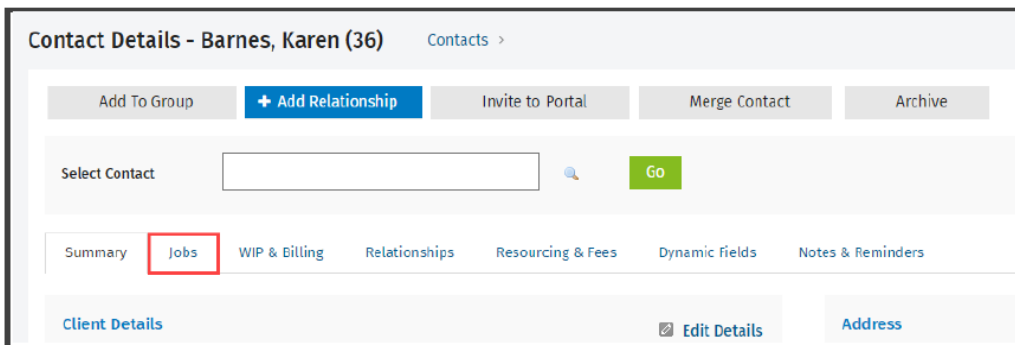
Use the recurring job process to establish jobs on a given cycle. For example, weekly, bi-weekly, monthly or quarterly. This works best for jobs with a defined cycle that repeat regularly, such as write-up, sales tax, payroll or payroll compliance.

i Recurring jobs help you have the relevant jobs open and ready for your clients.

Creating Recurring Jobs

To create recurring jobs:

1. From **Contacts**, select a contact to display the Contact Details page for that client. Click the **Jobs** tab.



Contact Details - Barnes, Karen (36) [Contacts >](#)

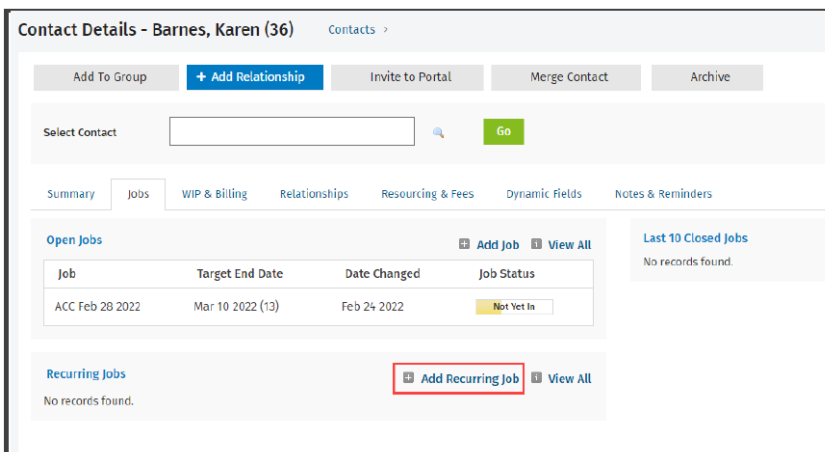
Add To Group **+ Add Relationship** Invite to Portal Merge Contact Archive

Select Contact [Go](#)

Summary **Jobs** WIP & Billing Relationships Resourcing & Fees Dynamic Fields Notes & Reminders

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

2. CCH iFirm displays the Contact Details page reflecting the job details for this client. From the recurring jobs section, click **Add Recurring Job**.



Contact Details - Barnes, Karen (36) [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

Open Jobs [Add Job](#) [View All](#)

| Job | Target End Date | Date Changed | Job Status |
|-----------------|------------------|--------------|------------|
| ACC Feb 28 2022 | Mar 10 2022 (13) | Feb 24 2022 | Not Yet In |

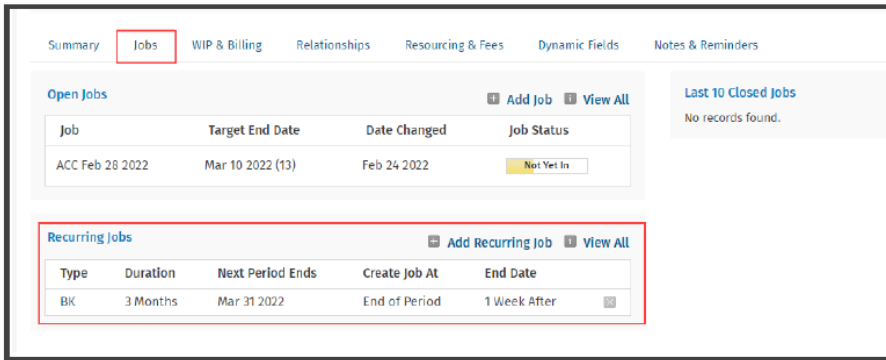
Recurring Jobs [Add Recurring Job](#) [View All](#)

No records found.

3. CCH iFirm displays the Add Recurring Job dialog box. Select the **Job Type**.
4. In creating a recurring job, you must also select period length and when the next period ends. This is used to establish the frequency.
5. Next, select when you want the job created and target end date.

6. Next, you will have the option to select who will take ownership of this job, as well as set the initial job status.
7. If you have estimated the amount you will charge for this job, you can enter this in the **Budget Total** field.
8. You can provide a description of the job. If not, the system pulls the description defined for the selected Job type. Once all the recurring job details have been set, click **Save**.

9. CCH iFirm displays the recurring job details in the Recurring Jobs section.



i For additional details about setting up recurring jobs, click [here](#).

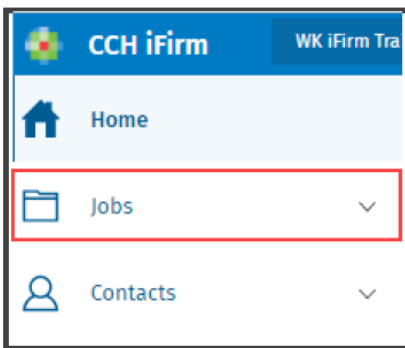
Setting Up Recurring Jobs in Bulk

Use the recurring job process to establish jobs on a given cycle; for example, weekly, bi-weekly, monthly or quarterly. This works best for jobs with a defined cycle that repeat regularly, such as write-up, sales tax, payroll, or payroll compliance.

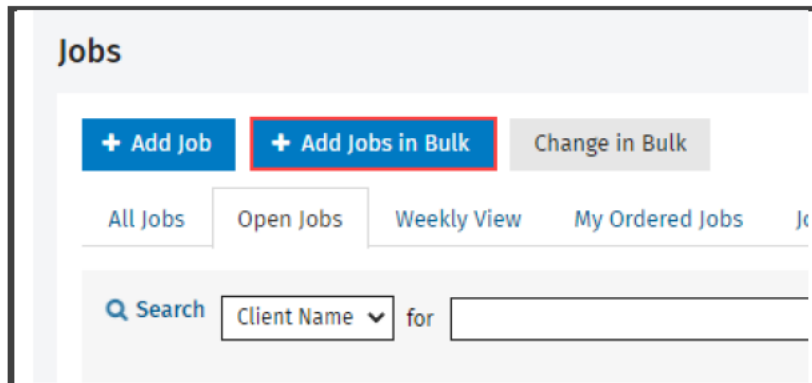
Recurring jobs can be created at the client level or can be created in bulk using range of filters to select which clients the recurring jobs apply to.

To create jobs in bulk:

1. From the Dashboard, click the **Jobs** navigation icon.



2. From the Jobs page, click **Add Jobs in Bulk**.



3. CCH iFirm displays the Bulk Job Creation page. Specify the settings for recurring jobs. This includes:

- Job Type
- Period Ended (if applicable)
- Target End Date
- Agreed Fee or Budget Total
- Jobs Status
- Job Details

Bulk Job Creation Jobs >

Bulk Job Creation.

Job Settings

Job Type Accounting

Period Ended

Target End Date

Agreed Fee

Budget Total

Job Status Allocated

Automatically set the job status to allocated when resources are assigned

Job Details

Do not create a new job if a job already exists for contact

4. Once the Job Settings have been entered, use the Contact and Dynamic Field filters to indicate who these recurring jobs will be created for. Click **Next**.

Contact Filters

Contact Type Client

Partner All

Manager All

Entity Individual

Client Type 1040 Basic

Tax Year End All

Annual Accounts Month All

Dynamic Field Filters

Payroll All

Tax All

Newsletter Client All

Next

i Dynamic Fields filters are only available if you have created Dynamic Fields questions. Review the *Working with Job Dynamic Fields* lesson for more information.

5. CCH iFirm displays a selection of clients that this recurring job will apply to. Confirm the selection of clients or edit the selection. To proceed, click **Create Jobs**.

Bulk Job Creation Jobs >

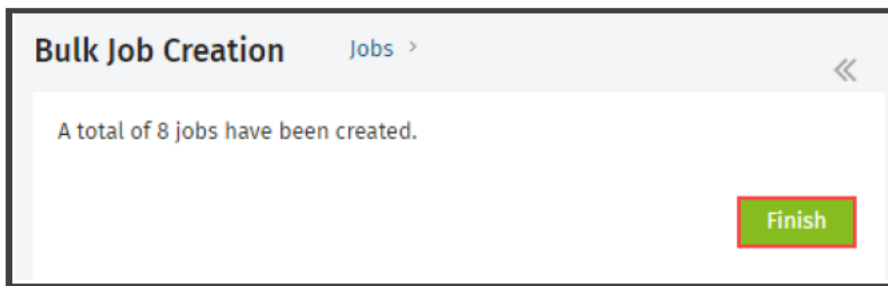
A total of 8 jobs will be created for the following clients.

[Back](#) [Create Jobs](#)

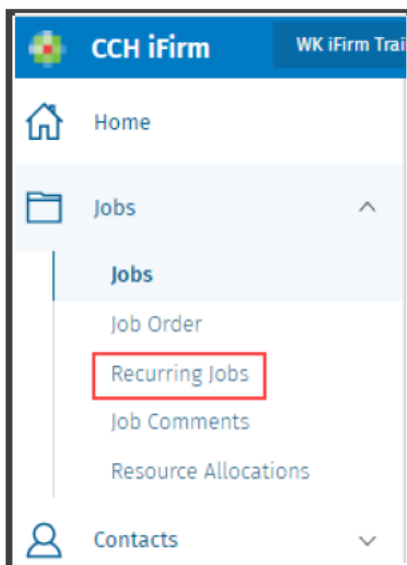
| <input checked="" type="checkbox"/> | Job | Target End Date | Code | Name | Tax Year End | Annual Accounts Month | Partner | Manager |
|-------------------------------------|---------------------|-----------------|------------|--------------------|--------------|-----------------------|-----------------|----------------|
| <input checked="" type="checkbox"/> | T1040 12/31/2021 | 03/15/2022 | 1410110647 | Caldwell, Megan | Dec | None | George Smith | Jacob Smith |
| <input checked="" type="checkbox"/> | T1040 12/31/2021 | 03/15/2022 | 1410110655 | Hammer, Thor | Dec | None | Maria Rangel | |
| <input checked="" type="checkbox"/> | T1040 12/31/2021 | 03/15/2022 | 1410110585 | Jameson, Odin | Dec | None | Maria Rangel | |
| <input checked="" type="checkbox"/> | T1040 12/31/2021 | 03/15/2022 | 1410110656 | Jingle, Jacob | Dec | None | Maria Rangel | |

- i** A new recurring job will not be created if a recurring job of the same job type was previously created in the Contacts area.

6. CCH iFirm message confirming that the recurring jobs were created. Click **Finish**.



7. CCH iFirm returns to the Jobs page. To manage recurring jobs, expand the **Jobs** navigation icon and select **Recurring Jobs**.



8. CCH iFirm displays the Recurring Jobs page.

Recurring Jobs

[+ Add Recurring Jobs in Bulk](#)
[Edit Budgets](#)
[Change in Bulk](#)

[Delete](#)
[Change Target End Date](#)
[Change Create Job At](#)
[Change Status](#)

| <input type="checkbox"/> | Code | Name | Job Type | Period Length | Next Period Ends | Create Job At | Target End Date | Status | Budget |
|--------------------------|------------|-----------------|----------|---------------|------------------|---------------|-----------------|-----------|---|
| <input type="checkbox"/> | 1410110468 | Barnes, Nick | ACC | 1 Month | 03/31/2022 | End of Period | 19 Days | Allocated | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | 1410110547 | ALLEN, HENRY | ACC | 1 Month | 03/31/2022 | End of Period | 19 Days | Allocated | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | 1410110568 | AVELAR, GONZALO | ACC | 1 Month | 03/31/2022 | End of Period | 19 Days | Allocated | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | ABC100 | ABC Pharmacy | ACC | 3 Months | 03/31/2022 | End of Period | 2 Weeks | Allocated | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | I10003 | All, Deed | ACC | 1 Month | 03/31/2022 | End of Period | 19 Days | Allocated | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | I10029 | Banks, Billy | ACC | 1 Month | 03/31/2022 | End of Period | 19 Days | Allocated | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | I10312 | Ambrose, Samuel | ACC | 1 Month | 03/31/2022 | End of Period | 19 Days | Allocated | <input type="checkbox"/> <input type="checkbox"/> |