CCH iFirm Learning Portal

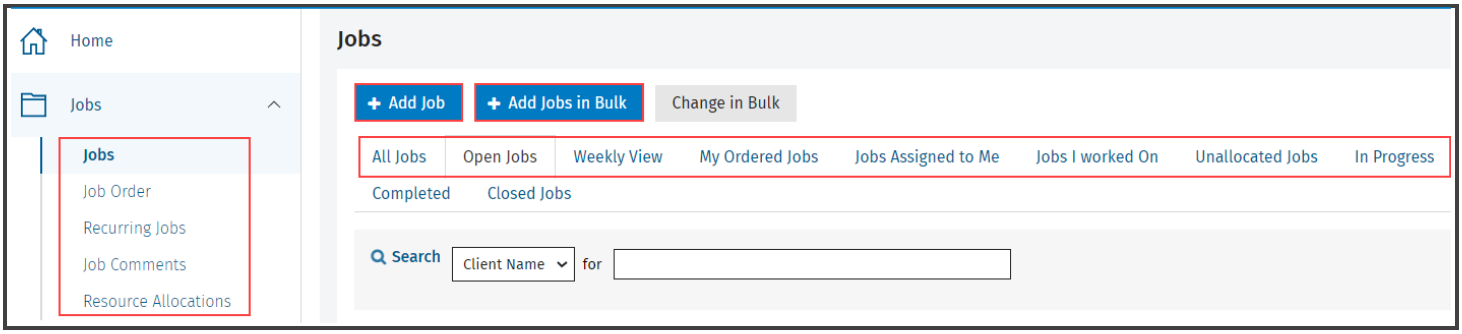
What is CCH iFirm Practice Management?

The Practice Manager module of CCH iFirm allows you to track the work you do for clients. This includes creating jobs for various tasks you are completing, tracking the amount of time spent on jobs, and managing the billing and invoicing aspects of your business. Practice Manager also includes reports to help you manage and grow your business.

Jobs

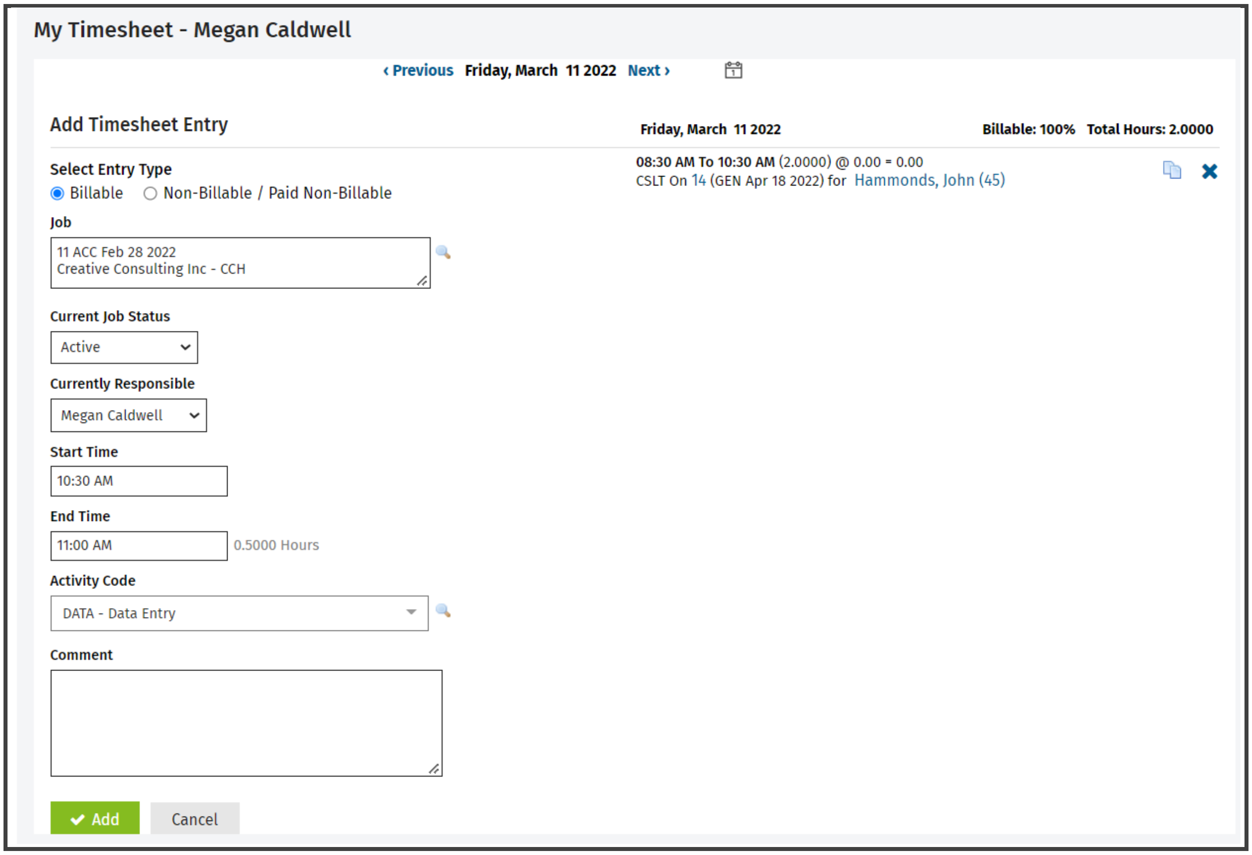
From the Jobs menu, you can create a single job, or create jobs in bulk for your contacts. You can also view and manage your existing jobs using the various tabs available on the Jobs page.

Jobs allow you to prioritize work, add checklists and notes to maintain efficiency, and assign work to specific preparers.



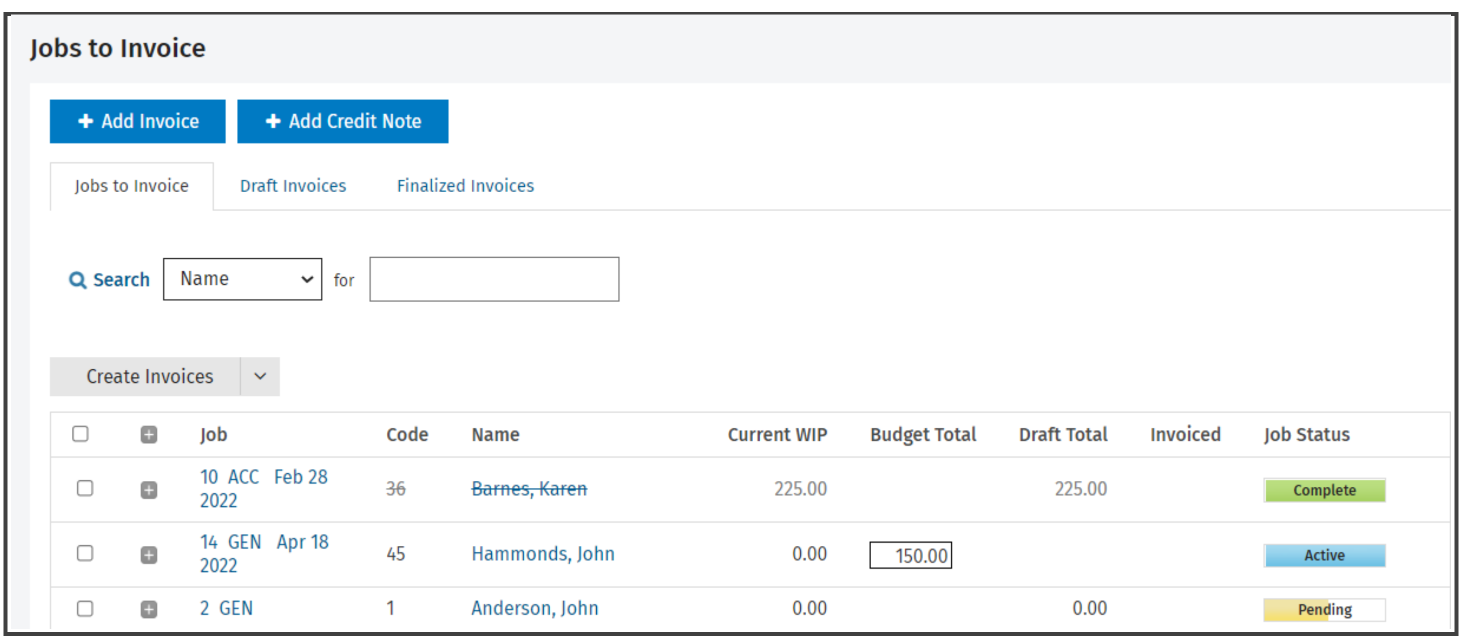
Timesheets

Use timesheets to track the amount of time you and your employees spend on specific tasks. You can indicate whether tasks are considered billable, non-billable, or paid non-billable. Timesheet entries also allow you to update the status of a job, who is currently responsible, and add comments about the work done.



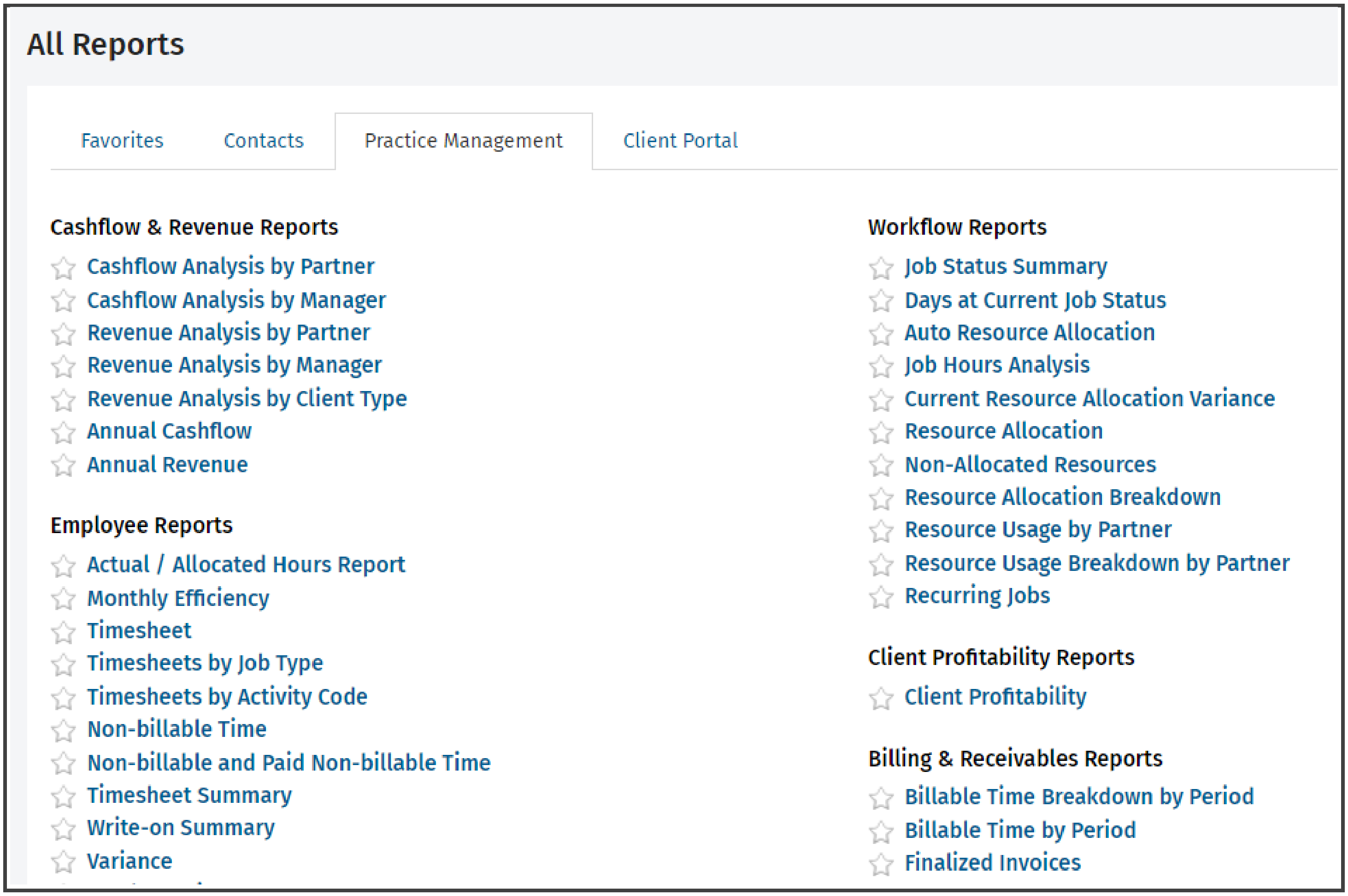
Invoicing

Practice Manager enables your firm to generate invoices for jobs at any time, rather than waiting until the end of the month. You can create multiple invoices for a job, whether the job is open or closed. You can create invoices individually or in bulk, and add a disbursement, write-on, or write-off as needed.



Reports

Practice Manager provides you with a wide range of reports. These can help you measure the performance of team members, see how your firm is performing, and much more. Whether you need to keep track of a particular employee's performance in relation to other team members, the revenue generated by each partner in your firm, or write-ons for the firm or resources, you will find a report to provide you with all these details and much more.



Review the individual lessons for more detailed information on using these features.