PortalSafe™ to CCH iFirm Client Portal Migration

To begin working with CCH iFirm Client Portal, you should first transfer your contacts and documents from your PortalSafe account to your CCH iFirm Client Portal site. This document guides you through this process.

Getting Started

Follow the steps below to gather the information you will need to successfully complete the transfer process.

1. Make sure you know your PortalSafe account credentials, including your Account ID number.

ℹ️ For ATX users, this is located in Preferences, on the Return Manager tab. For TaxWise users, this is located in Setup Assistant, in the View/Edit screen of the Admin username.

2. Ensure your CCH iFirm Client Portal is version 2017.16. The version displays at the bottom of the website.

> CCH iFirm 2017.16.35369 - Copyright 2017 Wolters Kluwer. All rights reserved

Important Items to Note

There are two security roles (Client Portal - View and Client Portal - Admin) associated with Client Portal in CCH iFirm. It is recommended to have both assigned to the user before the document import.

If a contact has been invited to Client Portal and has a valid email address, they will receive an email for each document that is being imported. To prevent multiple emails during the import process, you can turn off the "Notify client of new files in Portal" setting in the Portal Settings.

The name of the PortalSafe drawer will be stored as a folder in the CCH iFirm Contact's Client Portal. The folder structure and all documents will be copied to CCH iFirm Client Portal.

Empty folders or drawers present in PortalSafe will not be imported. Only folders or drawers containing documents will be imported.

Setting Up CCH iFirm Client Portal

First, set up contacts in Client Portal so your PortalSafe accounts can be matched. There are multiple ways to set up contacts in CCH iFirm.

- Sync your **ATX** or **TaxWise** contacts using the Bulk Export feature
- Import contacts using the CCH iFirm **.CSV template**
- Manually enter contacts in **CCH iFirm**

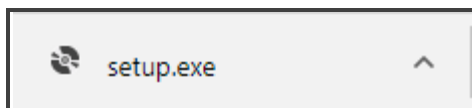ℹ The only information required for this transfer process is the contact name and email address.

Downloading the Utility

Download the migration utility **here**. To install:

1. Click the link provided above, and then click the **Install** button on the webpage.
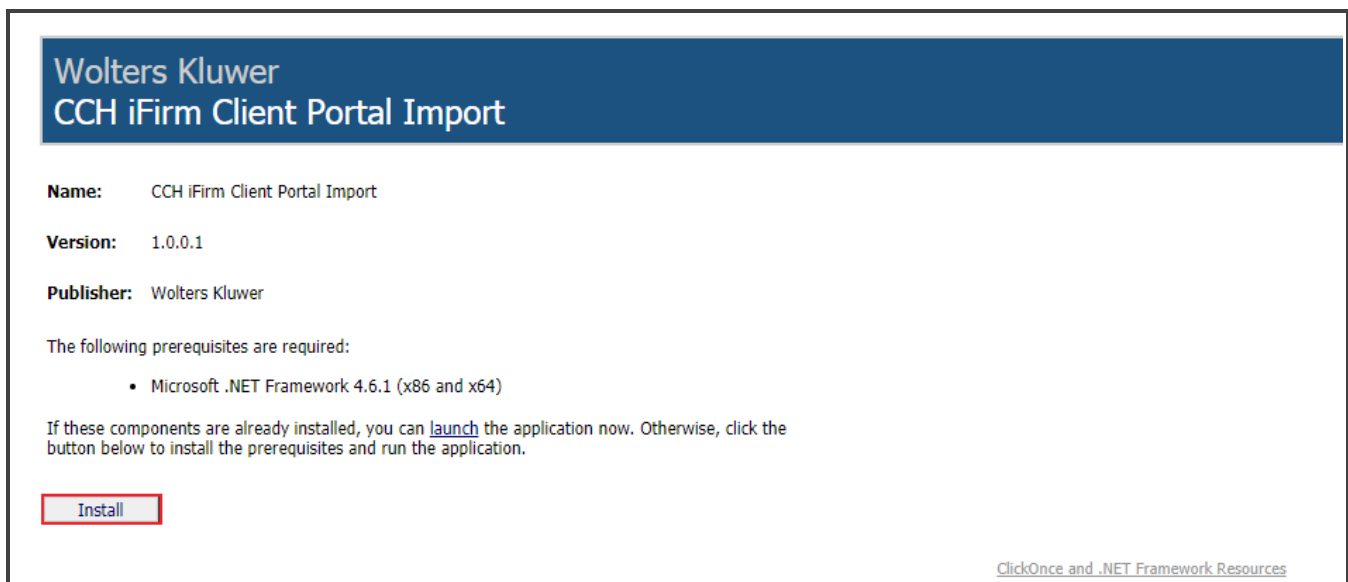
2. If using Google Chrome, click the **setup.exe** file at the bottom of the page.

3. If prompted, click **Run** to allow the software to install.
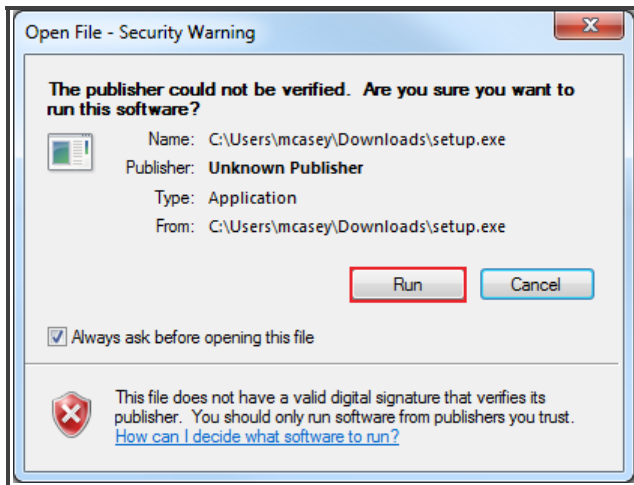
4. The CCH iFirm Client Portal Import utility installs, and the icon is added to your desktop. You can begin using the utility now, or at a later time if needed.

Running the Utility

After you have set up your contacts in CCH iFirm, you are ready to run the utility that transfers your documents from PortalSafe into CCH IFirm.

1. If the utility did not automatically open after the completed installation, double-click the icon on your desktop.
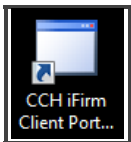
2. CCH iFirm Client Portal Import displays the License Agreement. Read through the terms, and if you agree, click **I Agree**.
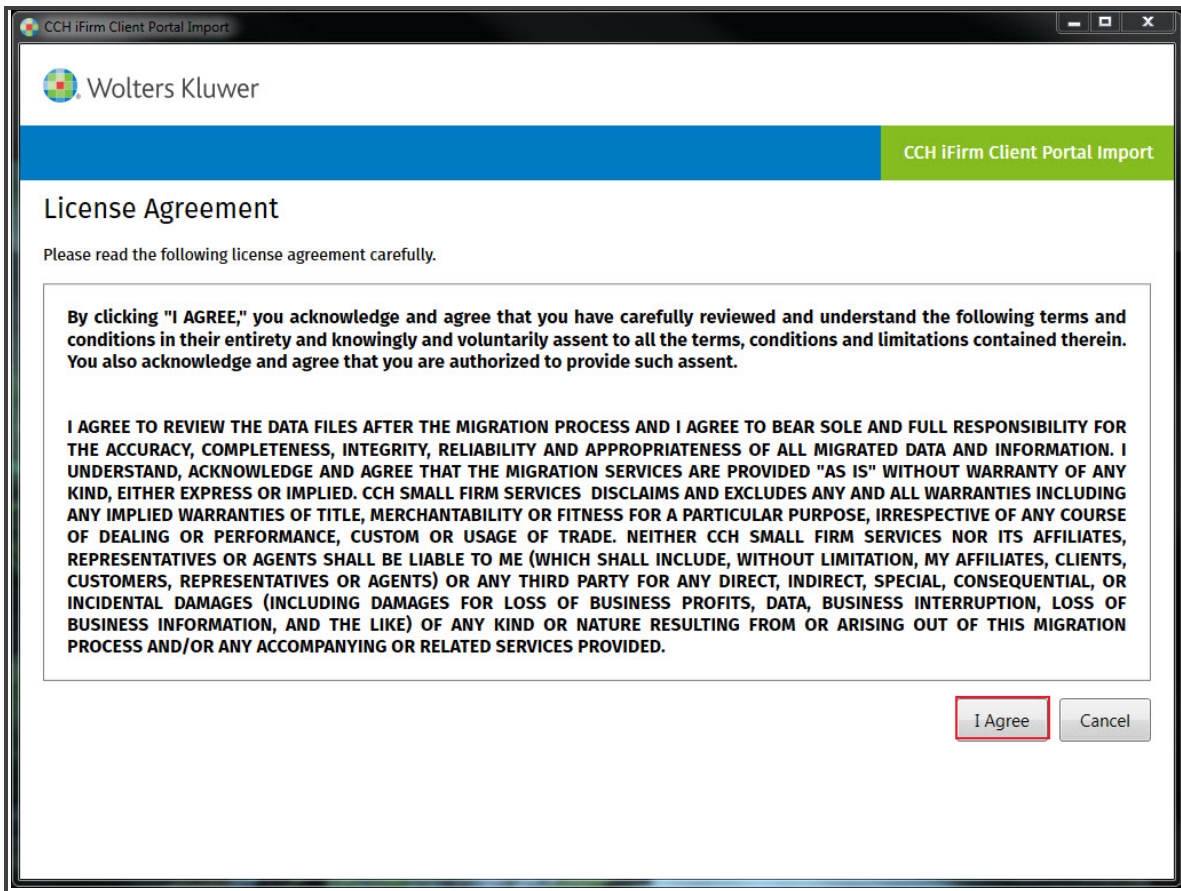
3. Next, the utility displays the Connect to PortalSafe screen.

4. Type your email address, password, and Account ID in the fields provided. Click **Connect to PortalSafe**.

5. The utility confirms the connection is successful. Click **Continue**.
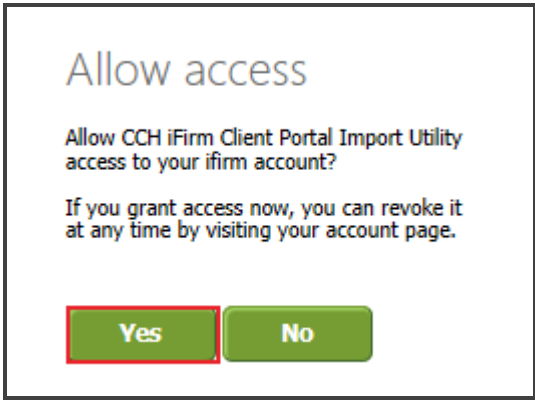

6. Type your CCH iFirm URL, and then click **Connect to iFirm**.
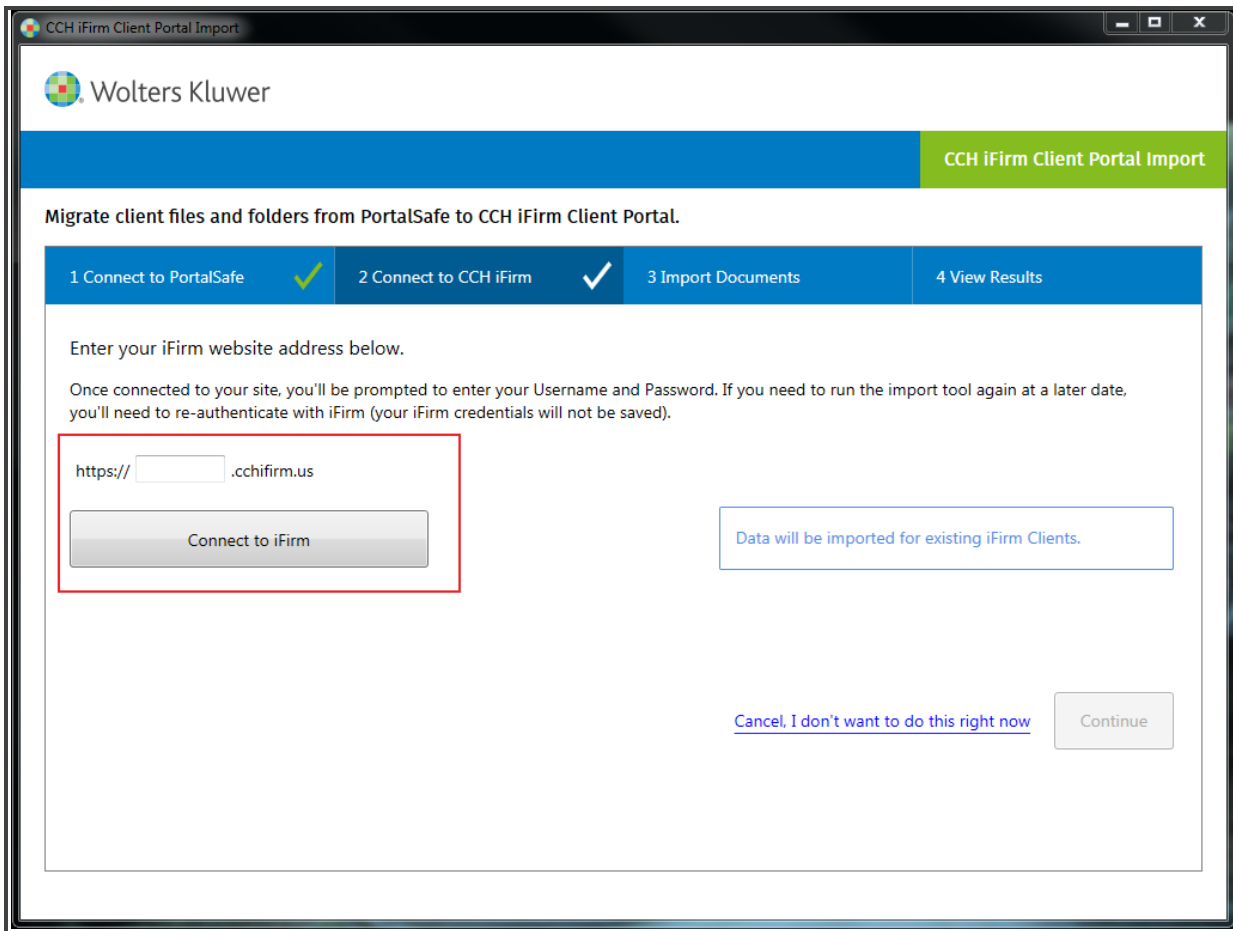
7. The Internet browser opens the Sign In with iFirm screen. Type your CCH iFirm user name and password in the fields, and then click **Login**.
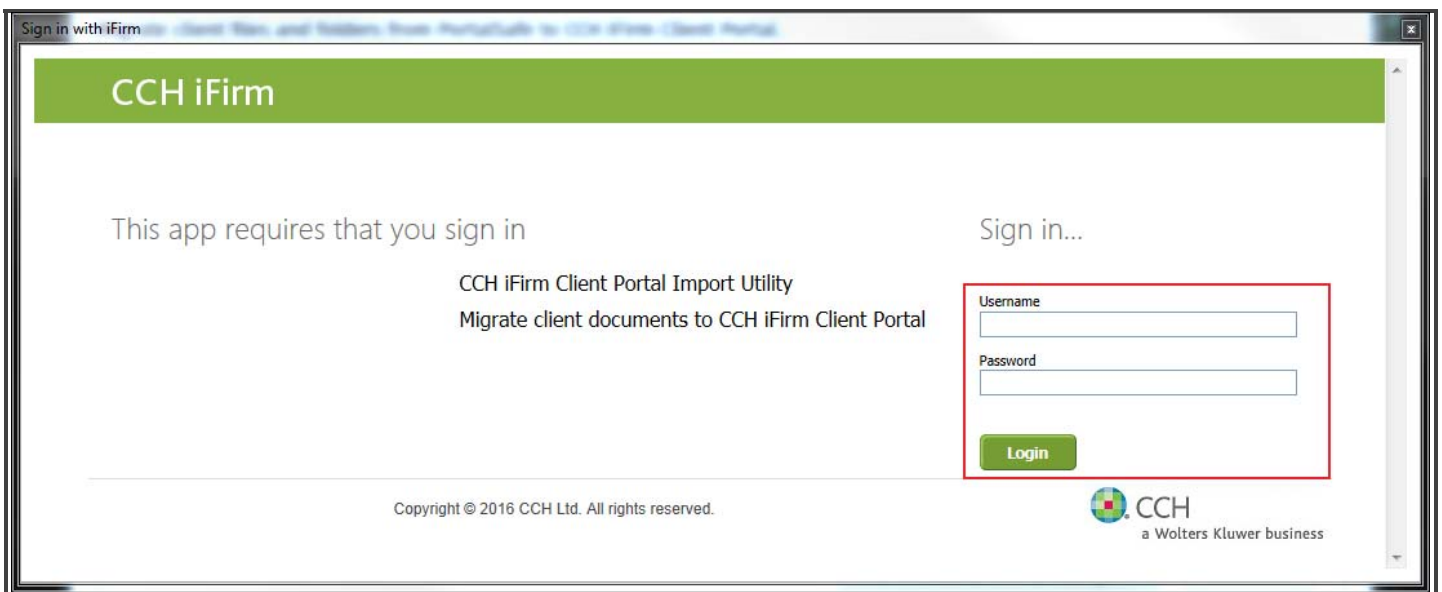
8. CCH iFirm Client Portal Import Utility requests access to your CCH iFirm account. Click **Yes** to allow access.

9. The utility confirms the connection is successful. Click **Continue**.
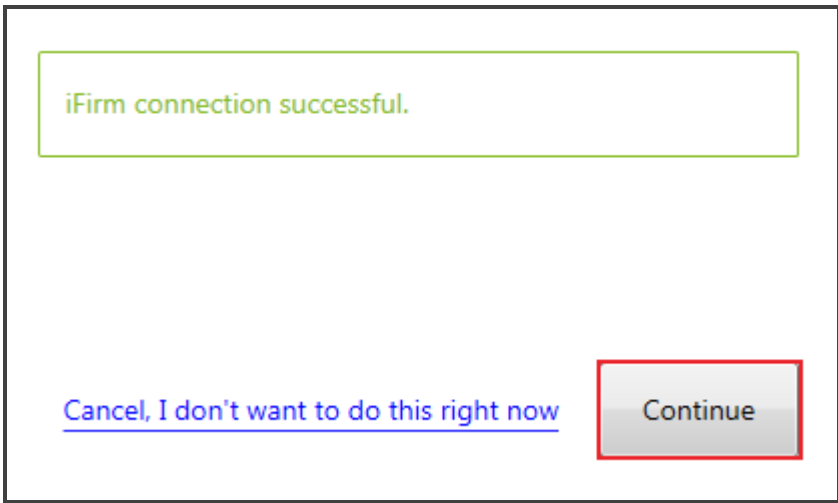
At this time, the utility searches your CCH iFirm contacts to locate contacts who match your PortalSafe contacts. Depending on the number of contacts and documents you have to transfer, this could take several minutes.
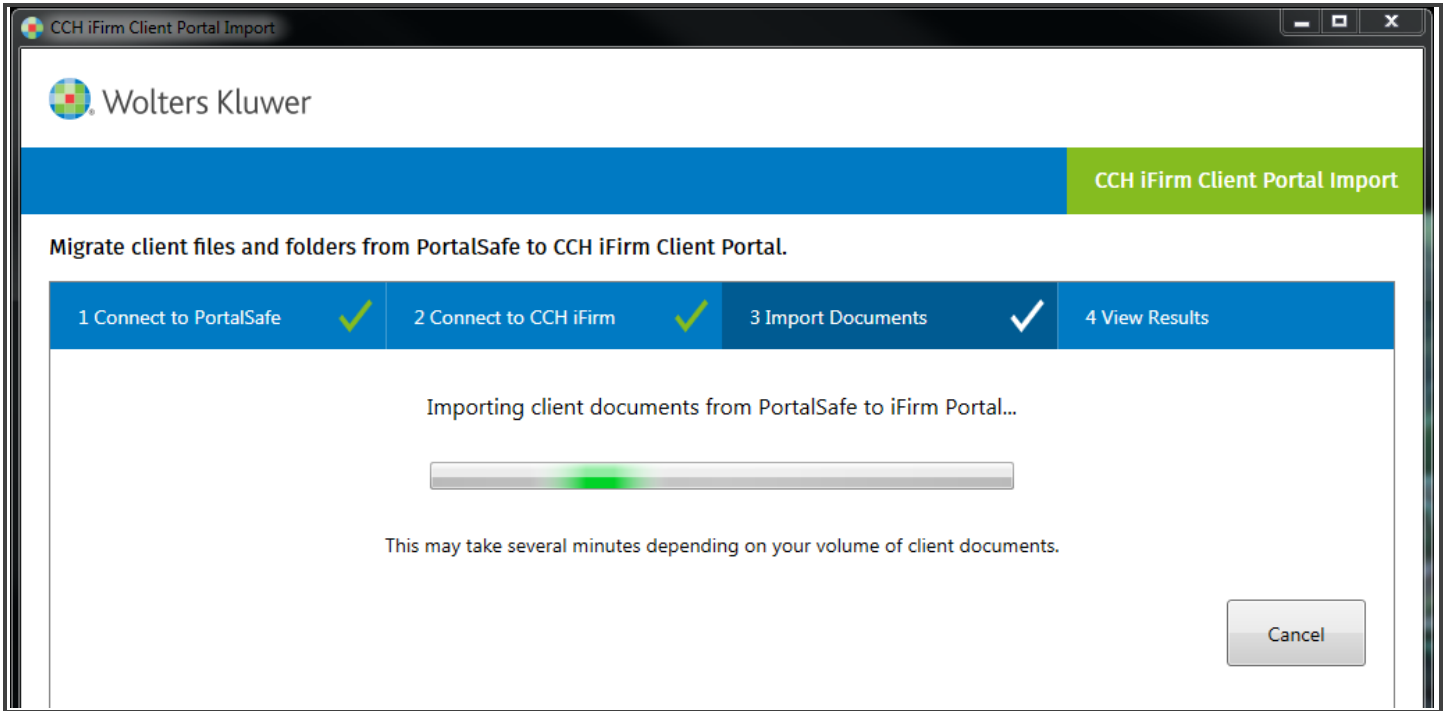
Once the process is complete, the utility displays the results:

- A **green** arrow indicates a match exists for that contact.
- A **yellow** arrow displays if there are multiple possible matches.
- A **red** arrow indicates there are no matches in your CCH iFirm site that correspond to your PortalSafe contacts.
- A **blue** arrow signifies that you have already transferred that client.
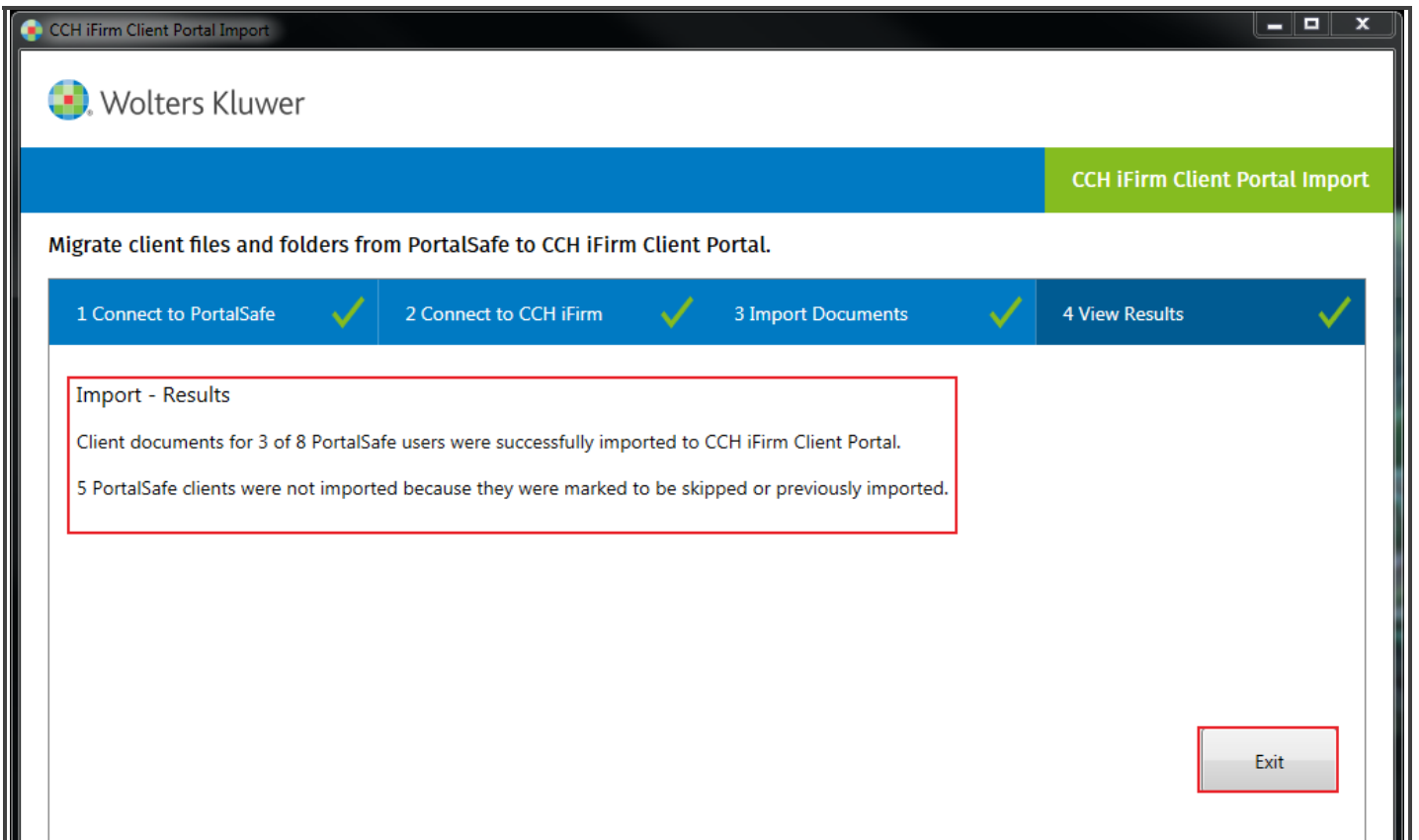
10. Verify the PortalSafe contacts are linked to the correct CCH iFirm contacts, and then click **Import**.

11. The utility displays a progress bar, indicating that the transfer is taking place.

12. Once the process is complete, the screen confirms how many clients were imported, and how many were skipped due to a lack of matches. Click **Exit**.
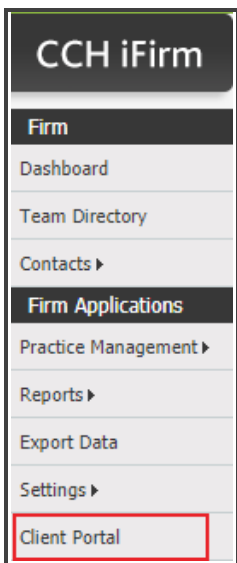
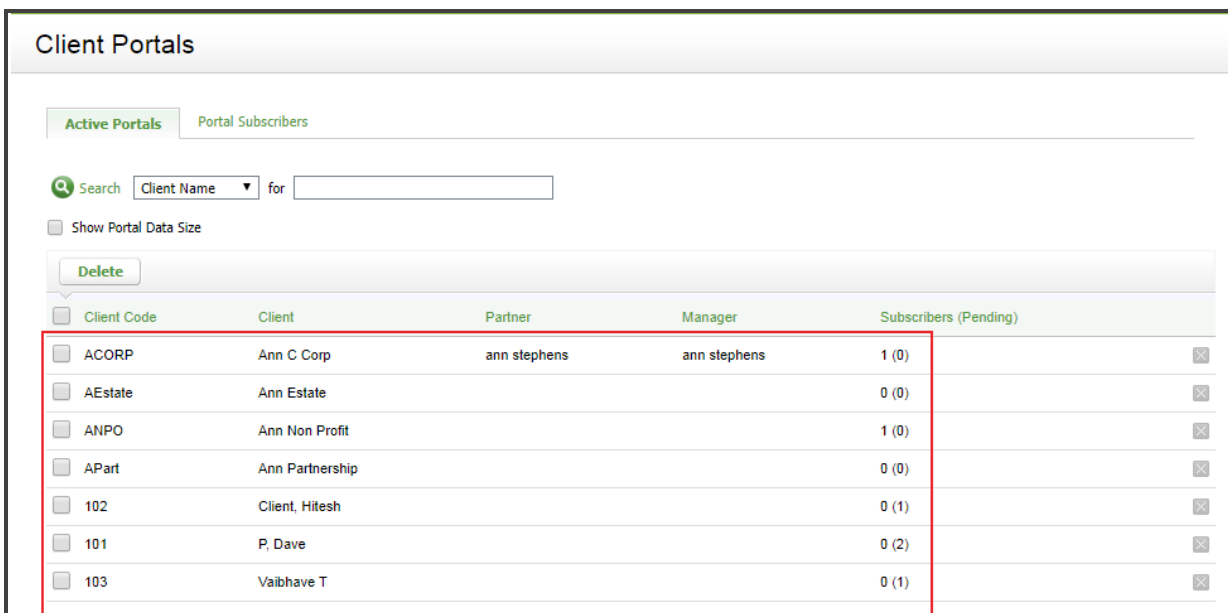# Viewing Documents in CCH iFirm Client Portal

After you successfully transfer your contacts and documents from PortalSafe to CCH iFirm, you can view the documents from the CCH iFirm Client Portal site.

To do this:

1. Log in to CCH iFirm.

2. Click **Client Portal** in the left navigation bar.

3. CCH iFirm displays the names of all your contacts who are now part of the Client Portal. Click any name to open the individual portal page.

4. This page displays three tabs. Click any tab to view the contents.
   - **Details** – all of the contact information and details available for this client
   - **Documents** – files and folders currently stored in the client's portal
   - **Unread Files** – documents the client has uploaded for you to view that you have not accessed yet
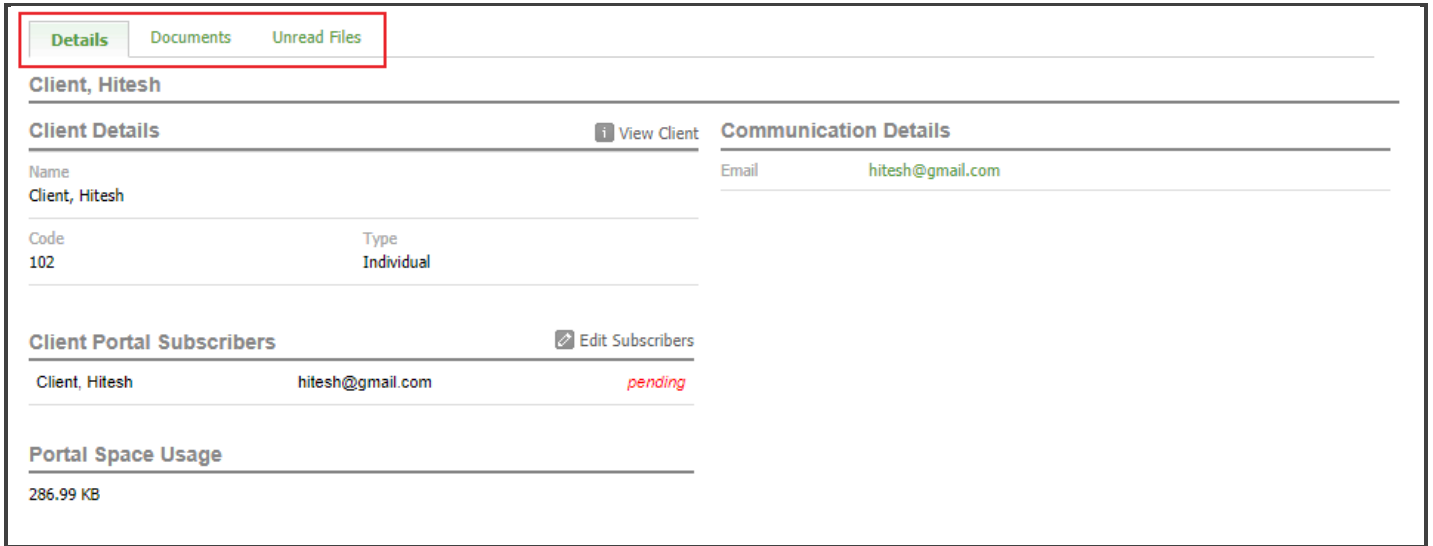
5. In the **Documents** tab, you can click any document to view it.

ℹ️ If there is a folder, when you click the icon, it opens to display all the files within that folder. You can then open a specific file.
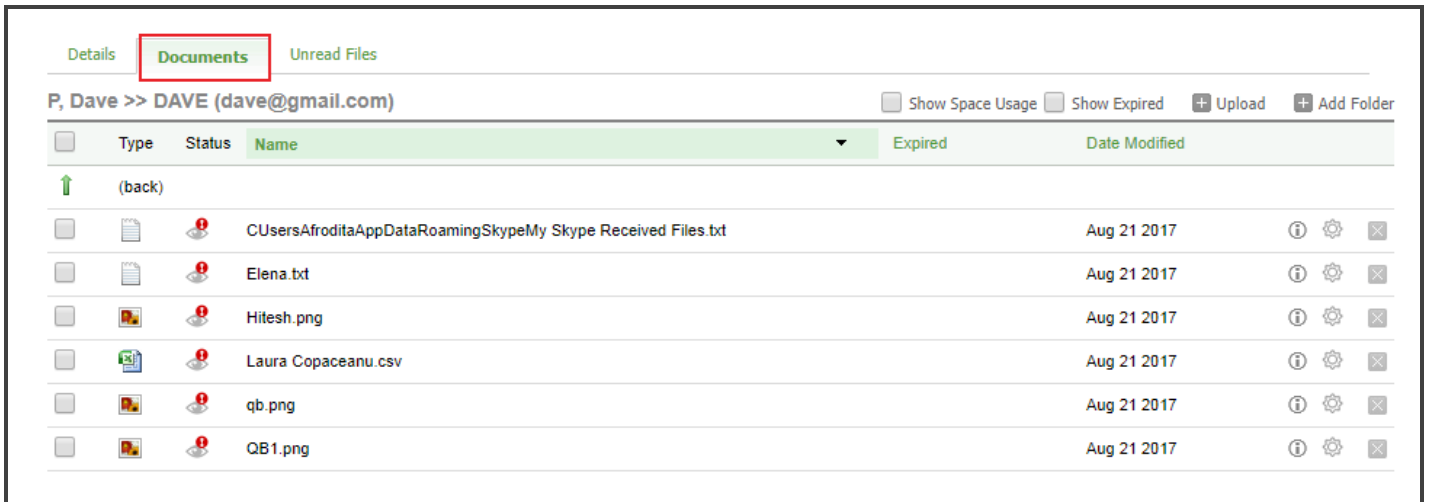
ℹ️ For more information about uploading and managing documents using CCH iFirm Client Portal, visit the **help files** for these topics.

ℹ️ You can also find more instructions for working with CCH iFirm Client Portal by viewing this **video**.