CCH iFirm 2017

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.
- 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.

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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

1 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.

	rs Kluwer Firm Client Portal Import	
Name:	CCH iFirm Client Portal Import	
Version:	1.0.0.1	
Publisher:	Wolters Kluwer	
• If these com	g prerequisites are required: Microsoft .NET Framework 4.6.1 (x86 and x64) ponents are already installed, you can <u>launch</u> the application now. Otherwise, click the r to install the prerequisites and run the application.	
Install		ClickOnce and .NET Framework Resources

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.

CCH iFirm Client Portal Import	
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	CCH iFirm Client Portal Import
License Agreement	
Please read the following license agreement carefully.	
By clicking "I AGREE," you acknowledge and agree that you have carefully reviewed and underst conditions in their entirety and knowingly and voluntarily assent to all the terms, conditions and You also acknowledge and agree that you are authorized to provide such assent.	
I AGREE TO REVIEW THE DATA FILES AFTER THE MIGRATION PROCESS AND I AGREE TO BEAR SOLE AI THE ACCURACY, COMPLETENESS, INTEGRITY, RELIABILITY AND APPROPRIATENESS OF ALL MIGRATI UNDERSTAND, ACKNOWLEDGE AND AGREE THAT THE MIGRATION SERVICES ARE PROVIDED "AS IS" KIND, EITHER EXPRESS OR IMPLIED. CCH SMALL FIRM SERVICES DISCLAIMS AND EXCLUDES ANY AND ANY IMPLIED WARRANTIES OF TITLE, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, I OF DEALING OR PERFORMANCE, CUSTOM OR USAGE OF TRADE. NEITHER CCH SMALL FIRM SE REPRESENTATIVES OR AGENTS SHALL BE LIABLE TO ME (WHICH SHALL INCLUDE, WITHOUT LIMITAT CUSTOMERS, REPRESENTATIVES OR AGENTS) OR ANY THIRD PARTY FOR ANY DIRECT, INDIRECT, SI INCIDENTAL DAMAGES (INCLUDING DAMAGES FOR LOSS OF BUSINESS PROFITS, DATA, BUSINE BUSINESS INFORMATION, AND THE LIKE) OF ANY KIND OR NATURE RESULTING FROM OR ARISI PROCESS AND/OR ANY ACCOMPANYING OR RELATED SERVICES PROVIDED.	ED DATA AND INFORMATION. I WITHOUT WARRANTY OF ANY O ALL WARRANTIES INCLUDING RRESPECTIVE OF ANY COURSE ERVICES NOR ITS AFFILIATES, FION, MY AFFILIATES, CLIENTS, SPECIAL, CONSEQUENTIAL, OR ESS INTERRUPTION, LOSS OF
	I Agree Cancel

- **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**.

CH iFirm Client Portal Import			
			CCH iFirm Client Portal Impo
igrate client files and fold	ers from PortalSafe to CCH iFirm C	Client Portal.	
1 Connect to PortalSafe	2 Connect to CCH iFirm	3 Import Documents	4 View Results
you'll need to re-authenticate Email Password Account Id	e with PortalSafe (your PortalSafe creder	ntials will not be saved).	
	talSafe		

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

Po	ortalSafe conne	ction succes	sful.	
Ca	ncel, I don't wa	int to do thi	s right now	Continue

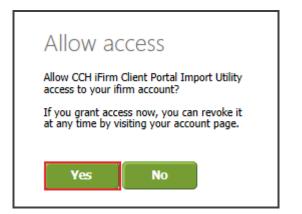
6. Type your CCH iFirm URL, and then click Connect to iFirm.

					CCH iFirm Client Portal Imp
grate client files and folde	ers from PortalSafe	to CCH iFirm C	lient P	ortal.	
1 Connect to PortalSafe	2 Connect to	CCH iFirm	\checkmark	3 Import Documents	4 View Results
Enter your iFirm website a Once connected to your site, y you'll need to re-authenticate	you'll be prompted to e				the import tool again at a later date,
https:// .cchifirm Connect to iFi					orted for existing iFirm Clients.

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**.

Sign in with iFirm	×
CCH iFirm	*
This app requires that you sign in	Sign in
CCH iFirm Client Portal Import Utility Migrate client documents to CCH iFirm Client Portal	Username
	Password
This app requires that you sign in CCH iFirm Client Portal Import Utility Migrate client documents to CCH iFirm Client Portal	Login
	a Wolters Kluwer business

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.

iFirm connection successful.	
Cancel, I don't want to do this right now	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:

The following matches were found; please review before continuing. Make adjustments as necessary before completing the import. PortalSafe User CCH iFirm Contact	
Name Email Name, Email	Skip
jbrown@abcpharmacy.com	• III
James Brown jbrown@abcpharmacy.com	•
David Smith dsmith@chastainproperties.com Chastain Properties (dsmith@chastainproperties.com) [C-Corporation]	
lohn Doe johndoe@test.com Doe, John (johndoe@test.com) [Individual]	0
lane Doe janedoe@test.com No matching contact found. Please create contact in iFirm and retry.	1
Chastain Properties dmith@chastainproperties.com	3

- 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.

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							CCH iFirm Clien	it Portal Import
	Migrate client files and fo	olders fro	m PortalSafe to CCH iFirm	Client	Portal.			
	1 Connect to PortalSafe	\checkmark	2 Connect to CCH iFirm	\checkmark	3 Import Documents	\checkmark	4 View Results	
			Importing client docur	nents fro	om PortalSafe to iFirm Po	rtal		
			'his may take several minutes	dependir	ng on your volume of client d	ocuments.	_	
								Cancel

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**.

CCH iFirm Client Portal Import						– – X
🜏 Wolters Kluwer						
					CCH iFirm Client	Portal Import
Migrate client files and folders fro	m PortalSafe to CCH iFirm	Client P	vortal.			
1 Connect to PortalSafe 🛛 🧹	2 Connect to CCH iFirm	\checkmark	3 Import Documents	\checkmark	4 View Results	\checkmark
Import - Results Client documents for 3 of 8 PortalSaf 5 PortalSafe clients were not importe						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.

CCH iFirm
Firm
Dashboard
Team Directory
Contacts ►
Firm Applications
Practice Management >
Reports ►
Export Data
Settings 🕨
Client Portal

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.

Client Portals					
Active Portals Po	ortal Subscribers				
Q Search Client Nam	e 🔻 for				
Show Portal Data Size					
Delete					
Client Code	Client	Partner	Manager	Subscribers (Pending)	
ACORP	Ann C Corp	ann stephens	ann stephens	1 (0)	E
ACORP	Ann C Corp Ann Estate	ann stephens	ann stephens	1 (0) 0 (0)	E
		ann stephens	ann stephens		
AEstate	Ann Estate	ann stephens	ann stephens	0 (0)	E
AEstate	Ann Estate Ann Non Profit	ann stephens	ann stephens	0 (0) 1 (0)	
AEstate ANPO APart	Ann Estate Ann Non Profit Ann Partnership	ann stephens	ann stephens	0 (0) 1 (0) 0 (0)	

- **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

Details Documer	nts Unread Files				
Client, Hitesh					
Client Details		i View Client	Commur	nication Details	
Name			Email	hitesh@gmail.com	
Client, Hitesh					
Code	Туре				
102	Individual				
Client Portal Subscribers		🖉 Edit Subscribers			
Client, Hitesh	hitesh@gmail.com	pending			
Portal Space Usage	e				
286.99 KB					

5. In the **Documents** tab, you can click any document to view it.

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.

P, Dave >> DAVE (dave@gmail.com)		Show Space Us	Show Space Usage Show Expired 🕒 Upload			🛨 Add Fol		
	Туре	Status	Name	 Expired 	Date Modified			
Î	(back)							
		-	CUsersAfroditaAppDataRoamingSkypeMy Skype Received Files.txt		Aug 21 2017	(i)	Ô	
	<u> </u>	-	Elena.txt		Aug 21 2017	(j)	Ô	
		₿	Hitesh.png		Aug 21 2017	(j)	Ô	
		₿	Laura Copaceanu.csv		Aug 21 2017	(i)	Ô	(
		₿	qb.png		Aug 21 2017	(i)	Ô	1
			QB1.png		Aug 21 2017	(j)	ŵ	1

For more information about uploading and managing documents using CCH iFirm Client Portal, visit the **help files** for these topics.

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