



To communicate with my client

Streamline your client communication, by securely and efficiently sharing documents with clients online.

Wherever your clients are, connect with them easily and securely, on a contemporary platform, which boosts efficiencies across the board.

From simple document sharing to secure digital signing, there's never been a safer way to communicate with your clients.



The easy way to work

As more firms seek to engage with clients remotely, CCH iFirm Client Portal provides an easy-to-use, secure channel to share data, reports or documents for review or digital signing with clients. As the status of each document is shown, you can tell at a glance whether it has been opened or signed by your client.



First-class encryption

For your peace of mind, CCH iFirm Client Portal employs the very latest in tried-and-tested security innovation, which means you know that whatever it is you're sending, sharing or saying, you can be absolutely confident that no-one else is intercepting or viewing your material. For additional security, you can use multi-factor authentication within the portal, ensuring privacy and security are of utmost priority.



Intelligent integration

CCH iFirm Client Portal integrates with CCH iFirm Signatures to facilitate digital signing of documents as well as the Contacts, Practice Management and Document Vault modules.



CCH iFirm is an award-winning, cloud-based suite of unified practice management and compliance tools for your firm.

- ✓ Practice Manager
- ✓ Client Accounting
- ✓ Tax
- ✓ CGT Reporter
- ✓ Document Vault
- ✓ **Client Portal**
- ✓ Signatures
- ✓ Web Manager

“This seamless integration of applications in CCH iFirm saves us significant time in our levels of reporting and client service. We have eliminated unnecessary duplication and made it even easier to manage projects and proactively communicate with our clients at the same time. This can also happen anywhere – which is entirely essential to the growth of the modern workforce.”

Phil Marendaz
Managing Director, Marendaz
Accountants & Business Consultants

Available as a standalone solution, or fully integrated with CCH iFirm and CCH Signatures tools.

Client Portal

Client Details

Name: Example Company Limited
 Code: 12345 Type: Company
 Client Type: Business
 Post-Newsletter: No

Client Portal Subscribers

Name	Email
Janice Example	JaniceExample@mail2newzealand.com
John Example	johnexample@gmx.com
Jane Example	janeexample@gmx.com

Portal Space Usage (Last Generated : Nov 09 2022 11:17 AM)

10.68 MB

Category	Usage (MB)
Red	3.97
Green	3.26
Orange	1.53
Purple	0.62
Brown	1.3

Client Portal dashboard in CCH iFirm

Client Portals

Client Code	Client	Partner	Manager	Subscribers (Pending)	Size
001	Example Company Limited			2 (0)	10.68 MB
002	Example Company Limited 2			1 (0)	294.02 KB
003	Example Company Limited 3			2 (0)	893.03 KB
004	Example Company Limited 4	Administrator	Administrator	1 (0)	0 B
005	Example Company Limited 5			4 (0)	1.26 MB
TOTAL					13.09 MB

Easy to view all your client's portals

My Documents - Jane Smith

Jane Smith >> Documents to be Signed

Type	Name	Status	Date Modified
(back)			
	Tax return 2022	New and waiting for 2 (2)	May 18 2022
	Engagement letter 2022	New and waiting for 1 (1)	Nov 08 2022
	Electronic lodgement declaration (ELD)	Viewed and waiting for 1 (1)	Dec 08 2021

Client view of CCH iFirm Client Portal

Request a demo today →