CCH Business Fitness
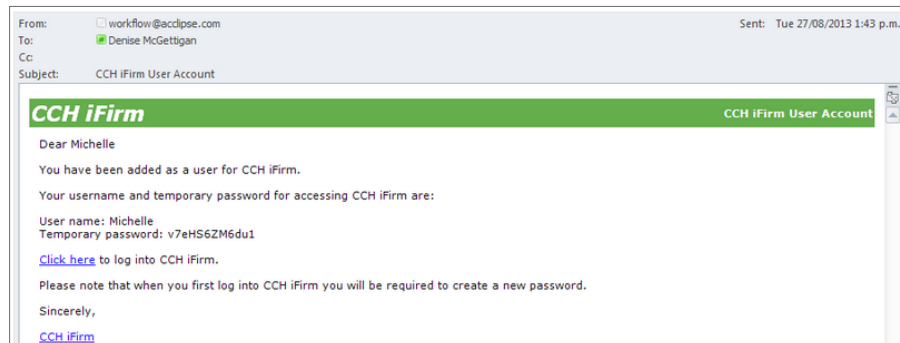
CCH Business Fitness content for iFirm Intranet Users

Getting Started

STEP 1: Sign in

Welcome to CCH Business Fitness content in CCH iFirm Intranet. Start by signing in to your iFirm site.

1. You will need your firm's iFirm URL and your username and password – you will receive an automatic email from iFirm containing your login details once your administrator has set up your user account.

Now that you're in your iFirm site, let's find out how to access the CCH Business Fitness content in iFirm Intranet.

STEP 2: Access CCH Business Fitness content

With a suite of over 1700 documents you have access to a range of resources to help you do your job. To view these documents in iFirm:

1. Click on the **Intranet link** on the iFirm left hand menu.

2. This will take you to the Intranet homepage featuring:

    a. **Search box** – to locate content

    b. **News** – read recent news from your firm

    c. **Publisher content updates** – view our latest content updates and news from the team at Business Fitness.

3. The **Business Fitness menu** is located on the right side of the screen under the Publishers menu.

4. Hover over the **Business Fitness logo** to view menu items.

Tip: Don't know what you're looking for? We recommend using the Content Hub menu item as an easy way to browse Business Fitness content

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Introducing the Content Hub

The content hub has been designed as a central access point for browsing CCH Business Fitness content. Laid out in five convenient categories to help you drill down and find the content you need, especially useful when you don't know exactly what you're looking for.

1. **Workpapers and Calculators** – a list of all available workpapers and calculators plus associated help guides. This is where you'll find our popular integrated workpapers for completing annual accounts.

2. **The Client** – sorted by services you offer to clients, you'll find links to relevant procedures and all associated resources. Whether it's a compliance task or value add service you'll find what you need to get the job done.

3. **Queries** – for common client queries refer to our library of FAQs that help you answer questions on the spot and accurately. All FAQs come with a script and a report that you can easily send to clients. Popular FAQs include Entertainment expenses, Minimum wage rates and KiwiSaver.

4. **The Firm** – from day-to-day operations to managing clients and your team you'll find a wealth of resources and internal processes for running and maintaining your practice.

5. **Coaching** – a library of business advisory resources, including kits, guides, checklists and forms so you can easily mentor clients and help them grow their business.

Searching for content

The top 3 things you should know to achieve the best search results in iFirm Intranet:

One tag: One keyword!

When you begin searching, start by typing the type of document you're looking for e.g. 'letter' and selecting the tag which appears. Then enter your keyword e.g. ACC

Don't forget you can use **Content Tags** too! Search Excel spreadsheets, PowerPoint presentations, text documents, web pages, images or PDF documents.

Use root words

Use the root word as your keyword and iFirm will automatically return results that contain any ending off this root word e.g. refund will find refund, refunded, refunding, and refunds.

Careful with multiple keywords!

Be aware when using multiple keywords, that iFirm will only find results that contain the exact sequence you use.
E.g. "GST refund" will find "GST Refund letter" but not "GST – large refund to IRD".
So stick to the golden rule **One Tag: One Keyword**

Add content to My Favourites

If you return to a piece of content on a regular basis then save time by adding it to your favourites.

1. From the Search Results page, click Actions, then click Add to Favourites.

2. You will see the My Favourites link in the top menu.

Send a document to a contact

Share documents stored in iFirm Intranet directly with a contact.

1. Select the document and on the **Content Information and Options** window, click the **Send to Contact** button.
2. In the **contact** box, start typing the contact name to see a list of suggestions.
3. Select a document style, if applicable.
4. Select content billing option, if applicable (Practice Manager module required).
5. Select how you want to send the document, either **Download content to computer** or **Send to Client Portal**.
6. Click **Send**.