
CCH Entities: Portal Setup Guide

What does the CCH Entities Portal do?

CCH Entities Portal is an additional, optional module that can be activated on request.

Invited parties can:

- View all or selected information on all People and Companies linked to the Company.
- View all shareholdings.
- View all registers.
- View all tasks and notes that have not been marked Firm Only.
- Download all company documents.
- Upload company documents.
- Print a company summary report as PDF, including all selected information.
- Send a query via email directly to your firm from the portal.
- Access more than one Company on a single login if they have multiple company involvements.
- Set and manage their own passwords.

The firm can:

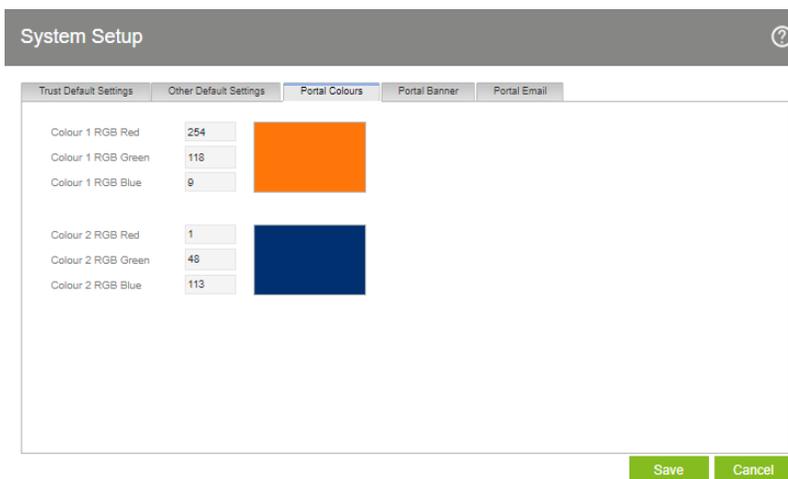
- Personalise the portal to their own company look and feel by changing the colors and adding a logo, or leave as the CCH Companies default.
- Add an onscreen message for all portal users.
- Add personalised information to the invitation email.
- Switch portal access on or off per person, per company.
- Select specific information to share/hide per person, per company.

Portal implementation

1. Ask your CCH Account Manager / support team to switch on the Portal module. There is no additional cost for this.
2. Add the link to Portal login on own web page.

https://cchitrust.com/CCH_iTrust_Portal

3. Set your preferred portal colors add under Setup / System Setup / Portal Colors.



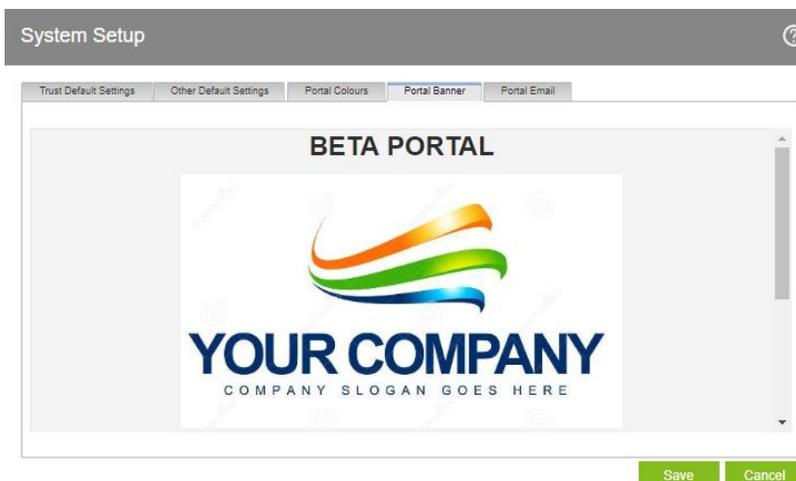
The screenshot shows the 'System Setup' interface with the 'Portal Colours' tab selected. It contains two color selection sections. The first section, 'Colour 1', has input fields for Red (254), Green (118), and Blue (9), with an orange color swatch. The second section, 'Colour 2', has input fields for Red (1), Green (48), and Blue (113), with a dark blue color swatch. 'Save' and 'Cancel' buttons are at the bottom right.

Tip: If you are not sure of the RGB numbers of your corporate colors there are a number of free 'color picker' tools available online that can help you.

Example:

<https://imagecolorpicker.com/>

4. Add a logo and add any additional text under Setup / System Setup / Portal Banner.



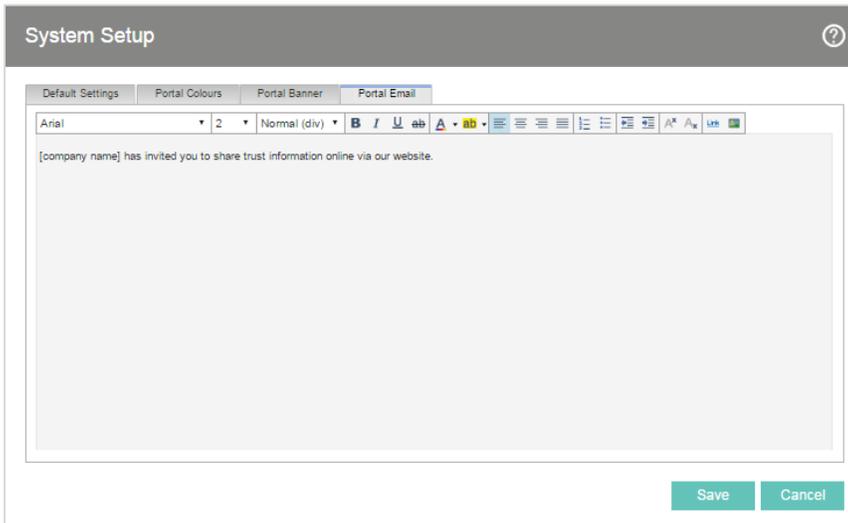
The screenshot shows the 'System Setup' interface with the 'Portal Banner' tab selected. It displays a preview of a banner with the text 'BETA PORTAL' at the top, a colorful logo in the center, and 'YOUR COMPANY' in large blue letters below it, with 'COMPANY SLOGAN GOES HERE' in smaller text underneath. 'Save' and 'Cancel' buttons are at the bottom right.

Tip: Adding a logo is easiest using Firefox.

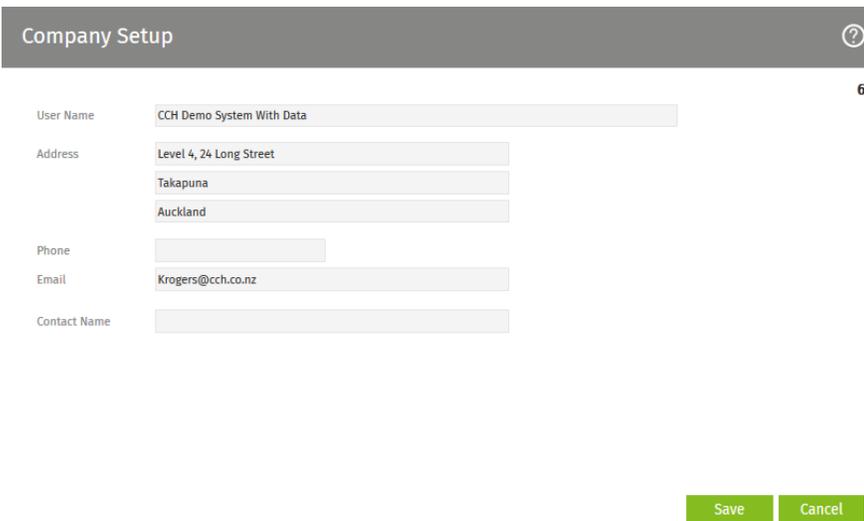
5. Go to Setup / System Setup – Templates / Portal Email Template

Add any additional text you would like to include in the invitation email.

This is the information your client will receive in an email containing the link to activate their portal access.



6. Go to Setup / Company Setup and ensure you have an email address.



This address will receive queries from the portal.

Tip: When going through the setup of CCH Entities Portal you can create a dummy company with yourself as a linked person and perhaps using your personal email address. This will allow you to experience the portal exactly as your customer does.

Your login to the portal will be entirely separate to your login to the software and will need a separate password.

You are now ready to invite people to share information.

Access

Person Linked to screen.

- Highlight the Company Name.
- Select Portal.
- Portal will be shown as a relationship if it is already set up.

Entity	Name	Capacity	
Trust	CCH TRAINING TRUST	Beneficiary/Trustee/Portal	Open Entity
Trust	FREEMAN FAMILY TRUST	Trustee/Portal	Replace
Trust	HAPPY DAYS TRUST	Beneficiary/Portal	Portal
Company	189 TRUSTEES LIMITED	Director/Portal	
Company	EXAMPLE COMPANY LTD	Director/Portal	
Company	THE BLUE FOLDER GROUP LIMITED	Director/Portal	
Limited Partnership	ROGERS PLUMBING LP	Partner	
Limited Partnership	GE STORES LIMITED PARTNERSHIP	Partner	
Company	3 WISE MEN TV LIMITED	Shareholder	
Person	La ADAMS	Power of Attorney	

Portal Configuration

- Select the items you wish this person to view via the Portal.
- The default setting is to share everything.
- Email the person to invite them to view the Portal.

Portal Configuration - Company

Company: EXAMPLE COMPANY LTD

Person: Karen Louise Rogers

Email Address: krogers@cch.co.nz

Portal Active Email Request

Directors

Shareholdings

Registers

Documents Exceptions

New Documents Included

Tasks

Annual Return

Summary Report

Save Cancel

Document Selection

- Select Exceptions to include or exclude specific documents.
- The default setting is to share all documents.
- Select New Documents Included to automatically allow this person to view all future documents you create or upload to the trust.

Documents
 Exceptions

New Documents Included

- Choose to include or exclude documents you want this person to view.
- Use Select All/Select None for quick selections.

Portal Configuration - Trust

<input checked="" type="checkbox"/>	15/02/2018	 Deed of Sale and Purchase and Acknowledgement of Debt
<input type="checkbox"/>	22/05/2017	 Declaration of Trust - one principal family member
<input type="checkbox"/>	22/05/2017	 Deed of Trust - single settlor
<input type="checkbox"/>	22/05/2017	 Declaration of Trust - one principal family member
<input type="checkbox"/>	18/04/2017	 Deed of Trust - husband and wife as settlors
<input type="checkbox"/>	29/03/2017	 Declaration of Trust - one principal family member
<input type="checkbox"/>	11/10/2016	 Deed of Trust - single settlor and two family members
<input type="checkbox"/>	10/10/2016	 Short Sig Test
<input type="checkbox"/>	10/10/2016	 Short Sig Test
<input type="checkbox"/>	10/10/2016	 Test Doc
<input type="checkbox"/>	10/10/2016	 Resolution of Trustees - minute builder
<input type="checkbox"/>	10/10/2016	 Test Doc
<input type="checkbox"/>	10/10/2016	 Test Doc
<input type="checkbox"/>	10/10/2016	 Deed of Trust - husband and wife as settlors
<input type="checkbox"/>	02/09/2016	 Deed of Trust - husband and wife as settlors

Select All
Select None

Back

The portal configuration is specific to this person and this company.

Settings must be updated for each company involvement at the appropriate level.

Portal configuration can be updated at any time.

Inviting people to share information via the portal

1. Open the Person and go to **Linked To**.
2. Check the access levels.
3. Select Email Request.

Portal Configuration - Company

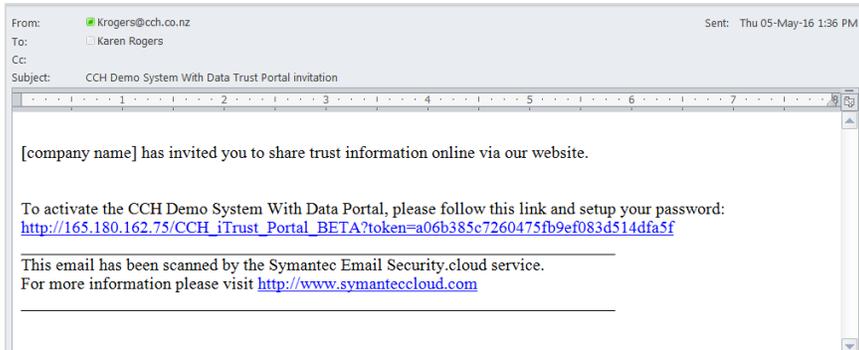
Company	EXAMPLE COMPANY LTD
Person	Karen Louise Rogers
Email Address	kr Rogers@cch.co.nz

- Portal Active Email Request
- Directors
- Shareholdings
- Registers
- Documents Exceptions
- New Documents Included
- Tasks
- Annual Return
- Summary Report

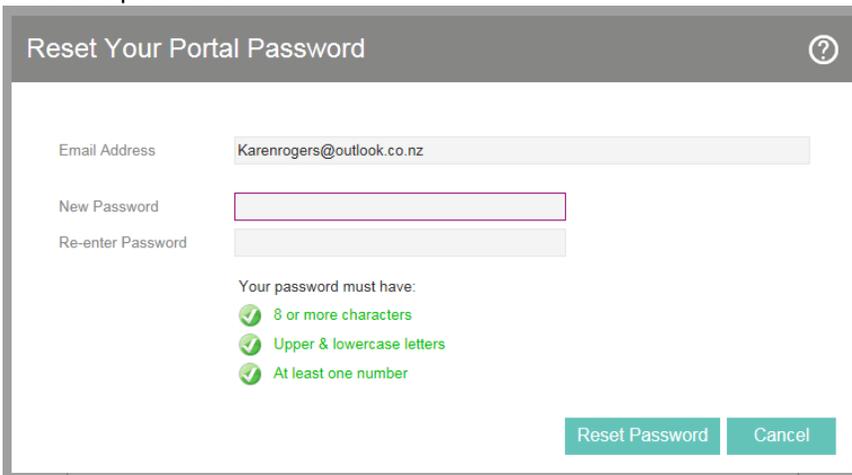
Save Cancel

Accepting an invitation to share information

1. The person you have invited will receive an email. They click on the link to setup their password.



2. Enter the password.



Reset Your Portal Password

Email Address: Karenrogers@outlook.co.nz

New Password:

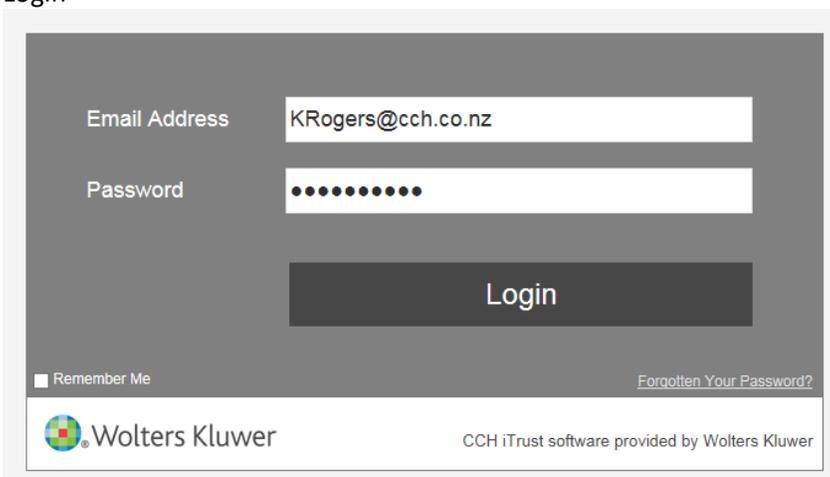
Re-enter Password:

Your password must have:

- ✓ 8 or more characters
- ✓ Upper & lowercase letters
- ✓ At least one number

Reset Password Cancel

3. Login



Email Address: KRogers@cch.co.nz

Password: ●●●●●●●●

Login

Remember Me [Forgotten Your Password?](#)

 Wolters Kluwer CCH iTrust software provided by Wolters Kluwer

Forgotten passwords

Your clients can use the Forgotten Your Password link to reset the password at any time.



Note: This is the only way to reset a password. The enhanced security of the system will not allow anyone from CCH to view, access or change a password on behalf of your client

You are now ready to start using CCH Entities Portal!

Portal screenshots

Trust/Company selection for individuals with multiple entities.

CCH Demo System With Data



Please select if you wish to work with Trusts or Companies

- Trusts
- Companies



Office hours:
Monday - Friday 9am to 5:30pm

If you have any queries please use the contact button on the left to email our office or call us on 09 1234 567

Company selection for individuals with multiple trusts.

CCH Demo System With Data



Please select the company you wish to work with



- EXAMPLE COMPANY LTD
- VIOLET DOG LIMITED



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Information dashboard, with full access

CCH Demo System With Data

EXAMPLE COMPANY LTD Karen Rogers (test portal) [Logout](#)

[Main Menu](#) [Select Another Company](#)

- Directors
- Shareholdings
- Registers
- Documents
- Tasks
- Annual Return
- Summary Report
- View in Companies Office
- Contact

BETA PORTAL



YOUR COMPANY
COMPANY SLOGAN GOES HERE

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Information dashboard, with limited access

CCH Demo System With Data

EXAMPLE COMPANY LTD Karen Louise Rogers [Logout](#)

[Main Menu](#) [Select Another Company](#)

- Directors
- Shareholdings Not Available
- Registers Not Available
- Documents Not Available
- Tasks Not Available
- Annual Return
- Summary Report
- View in Companies Office
- Contact

BETA PORTAL



YOUR COMPANY
COMPANY SLOGAN GOES HERE

Office hours:
Monday - Friday 9am to 5:30pm

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Director Information

CCH Demo System With Data

EXAMPLE COMPANY LTD

Karen Louise Rogers

Logout

Company Directors

Back

John Example

Address 123 Any Street, Takapuna, Auckland, New Zealand
Phone
Mobile
Email Address krogers@cch.co.nz

Jane Example

Address 123 Any Street, Takapuna, Auckland, New Zealand
Phone
Mobile
Email Address

Marcel Hoff

Address
Phone
Mobile
Email Address mhof@xtra.co.nz

Karen Louise Rogers

Address 123 Any Street, Auckland
Phone
Mobile
Email Address krogers@cch.co.nz

Shareholdings

CCH Demo System With Data

EXAMPLE COMPANY LTD

Karen Louise ROGERS

Logout

Company Shareholdings

Back

Allocation 1 - 65 shares

John Example
123 Any Street, Takapuna, Auckland, New Zealand

Allocation 2 - 25 shares

Jane Example
123 Any Street, Takapuna, Auckland, New Zealand

Allocation 3 - 10 shares

John Archer
1 Any Street, Auckland

David Smith
100 Main Road, Sunnyhills, Jacksonville, NZ

Allocation 4 - 5 shares

SMITH PARTNERSHIP
123 Any Street, Auckland, New Zealand

Registers

CCH Demo System With Data

EXAMPLE COMPANY LTD

Karen Louise ROGERS

Logout

Company Registers

Back

Register of Directors

Register of Share Transactions

Register of General Disclosure of Interests

Register of Specific Disclosure of Interest

Register of Directors' Remuneration and other benefits

Documents

Shows all or selected documents. Users can upload documents here.

CCH Demo System With Data

EXAMPLE COMPANY LTD

Karen Louise ROGERS Logout

Company Documents

All Documents Document Search Reset Upload Back

21/10/2019	 Directors' certificate.(ss 76(4),_77(2),_78(3))- financial assistance	
15/10/2019	 Directors' certificate.(ss 76(4),_77(2))- financial assistance	Signed On:
15/10/2019	 Solvency certificate for minority buy-out rights repurchase	
15/10/2019	 Birth Certificate	
15/10/2019	 Certificate of Christmas	Signed On: 15/10/2019
20/02/2018	 Minutes of the first meeting of directors.(A - see notes)	
20/02/2018	 Resolutions of directors in lieu of first meeting.(option A - see notes)	
01/02/2018	 Minutes of the first meeting of directors.(A - see notes)	
11/12/2017	 Resolutions of shareholders in lieu of meeting.re change of directors	
23/11/2017	 Resolutions of shareholders in lieu of meeting.re change of directors	
23/11/2017	 Resolution of shareholders in lieu of meeting adopting constitution	
09/10/2017	 Minutes of the first meeting of directors.(A - see notes)	

Tasks.

Any tasks that are set to 'Firm Only' will not be shown.

CCH Demo System With Data

EXAMPLE COMPANY LTD

Karen Louise ROGERS

Logout

Company Tasks

Task Search



Reset

Back

Date	Completed	Manager	Notes
25/05/2017		Bob Brown	test task



Annual Returns

CCH Demo System With Data

EXAMPLE COMPANY LTD

Karen Louise ROGERS

Logout

Company Annual Return

Back

AR Filing Month

Last Filed

AR Responsible

[View Company Extract](#)

Summary Report – Prints a PDF Company Summary Report containing all (or selected) trust information.

Company Summary

CCH Demo System With Data

Printed: 13/05/2020 16:38

EXAMPLE COMPANY LTD 40,775

Company Details

Company Name : EXAMPLE COMPANY LTD
 Company No : 123124232
 NZ Business No : 123456789
 Test Category Name : Limited Company
 Registered Address : 123 Any Street Auckland
 Phone :
 Fax :
 Mobile :
 Email :
 Work Phone :
 Contact :
 Signing Authority :
 Incorporation Date :
 IRD Number :

Directors

John Example	123 Any Street, Takapuna, Auckland, New Zealand
Jane Example	123 Any Street, Takapuna, Auckland, New Zealand
Marcel Hoff	
Karen Rogers (testportal)	123 Any Street, Auckland
Karen Louise ROGERS	123 Any Street, Auckland

AML

AML Status : Completed
 Last Review Date :
 Next Review Date : 24/05/2018

Checks :	25/05/2017	25/05/2017	Credit card with embossed name	87499387450034875
	24/05/2017	24/05/2017	Certificate of incorporation	

Notes

24/05/2017	John Example	Director & Shareholder	Certificate of citizenship
29/03/2017	David Smith	Shareholder	Certified copy of full birth certificate

1/0

Company Summary

CCH Demo System With Data

Printed: 13/05/2020 16:38

EXAMPLE COMPANY LTD 40,775

COB

COB Level : Completed
 Last Review Date :
 Next Review Date :
 Nature & Purpose of Business :

Alternative Contacts

Liquidator	Ben Archer	
Company Secretary	Karen Louise ROGERS	krogens@cch.co.nz

Dated Notes

20/02/2018	Company extract for January emailed to: krogens@cch.co.nz Company: EXAMPLE COMPANY LTD
20/02/2018	Company extract for January emailed to: Karenrogers@outlook.co.nz Company: EXAMPLE COMPANY LTD
15/02/2018	Company extract for January emailed to: krogens@cch.co.nz Company: EXAMPLE COMPANY LTD
15/02/2018	Company extract for January emailed to: Karenrogers@outlook.co.nz Company: EXAMPLE COMPANY LTD

Custom Data

Trusts

ROGERS FAMILY TRUST	TrusteePortal
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Documents

Date Created		Date Signed
21/10/2019 13:37	CCERF08 Directors' certificate (ss 76(4), 77(2), 78(3)) - financial assistance	
15/10/2019 13:34	CCERF08 Certificate of Contents	15/10/2019
15/10/2019 11:36	Birth Certificate	
15/10/2019 11:33	CCERF03 Solvency certificate for minority buy-out rights repurchase	
15/10/2019 11:33	CCERF04 Directors' certificate (ss 76(4), 77(2)) - financial assistance	
20/02/2018 11:33	CRESAP02a Resolutions of directors in lieu of first meeting (option A - see notes)	
20/02/2018 11:33	CMNAF01a Minutes of the first meeting of directors (A - see notes)	
01/02/2018 09:58	CMNAF01a Minutes of the first meeting of directors (A - see notes)	
11/12/2017 09:59	CRESAP10 Resolutions of shareholders in lieu of meeting re change of directors	
23/11/2017 13:39	CRESAP10 Resolutions of shareholders in lieu of meeting re change of directors	
23/11/2017 13:37	CRESAP10 Resolutions of shareholders in lieu of meeting re change of directors	
09/10/2017 11:57	CMNAF01a Minutes of the first meeting of directors (A - see notes)	
02/10/2017 14:27	CMNAF01a Minutes of the first meeting of directors (A - see notes)	
02/10/2017 14:25	CRESAP10 Resolutions of shareholders in lieu of meeting re change of directors	

2/0

Contact Email

Contact Email

To

Subject

Message