Wolters Kluwer

CCH Entities

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.
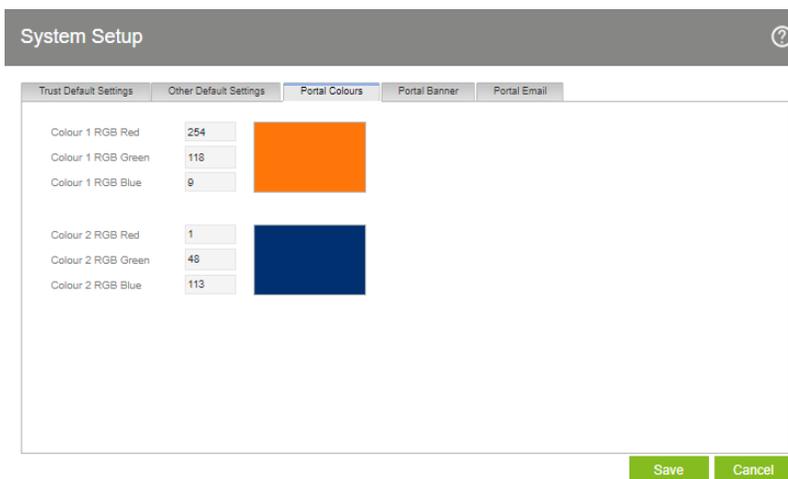

Tip: If you are not sure of the RGB numbers of your corporate colors there are a number of free 'color picker' tools available online that can help you.

Example:
https://imagecolorpicker.com/

4. Add a logo and add any additional text under Setup / System Setup / Portal Banner.
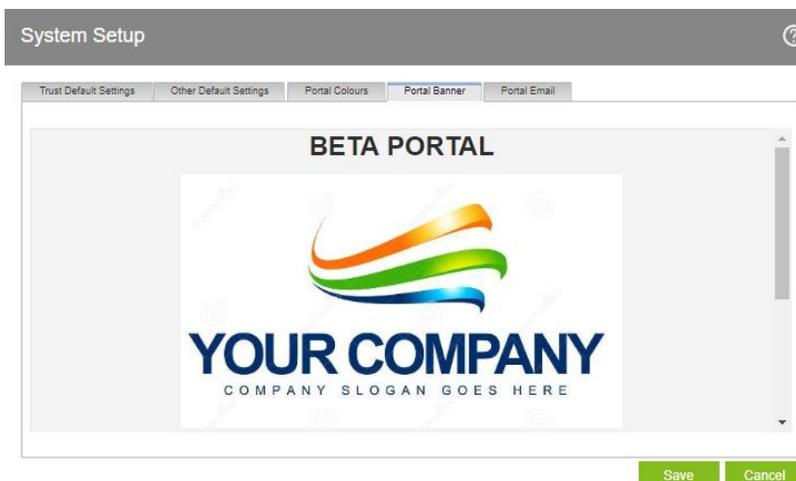
**Tip:** Adding a logo is easiest using Firefox.

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.
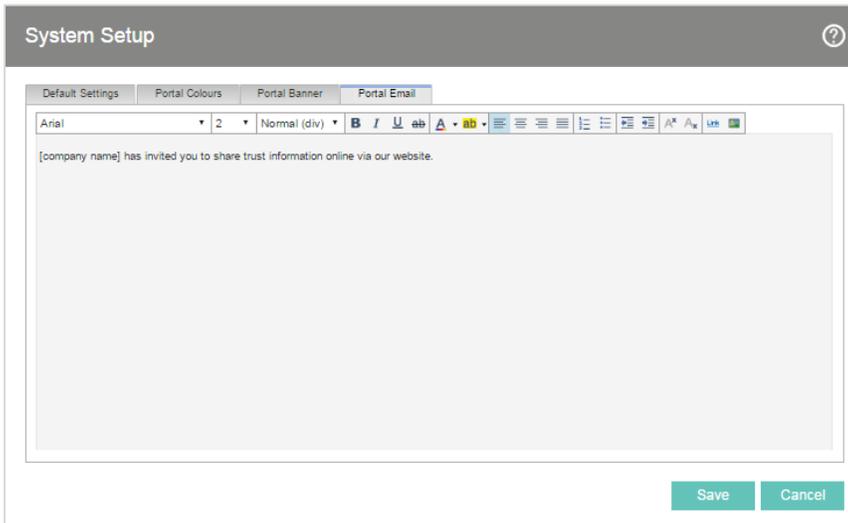
6. Go to Setup / Company Setup and ensure you have an email address.
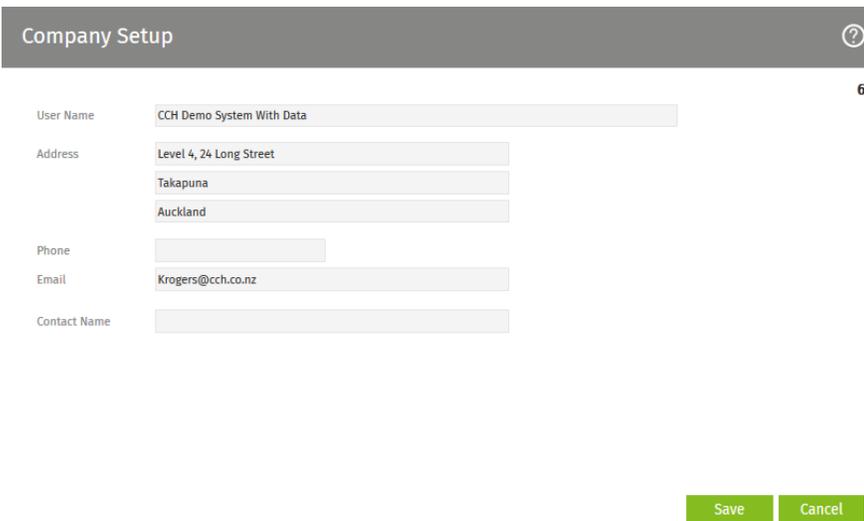
This address will receive queries from the portal.

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.

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.

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.

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

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.

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.
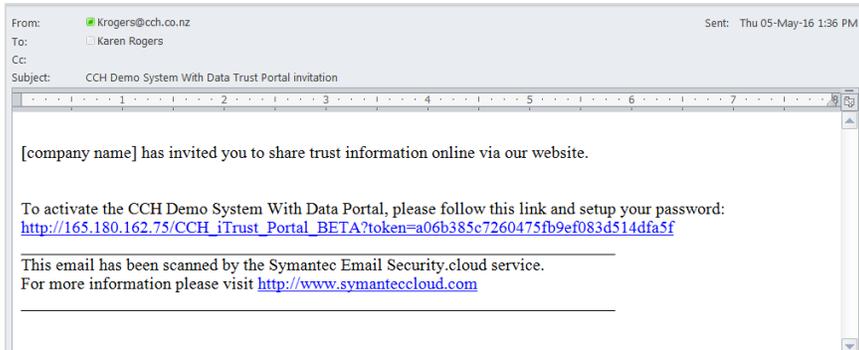
2. Enter the password.
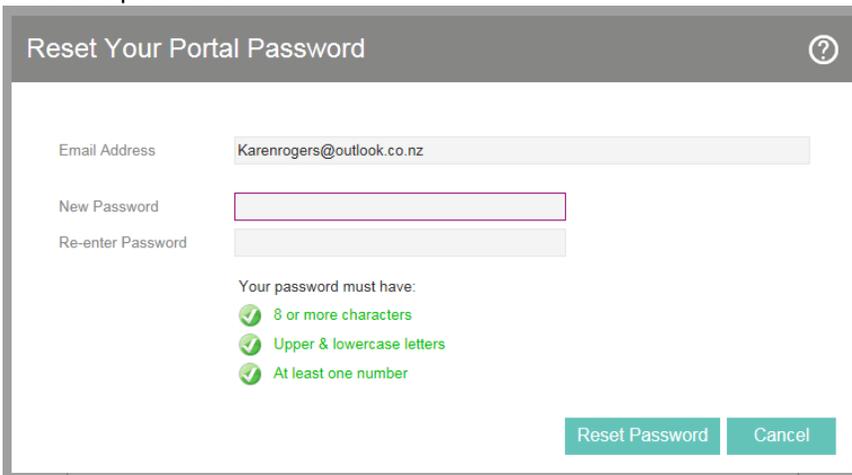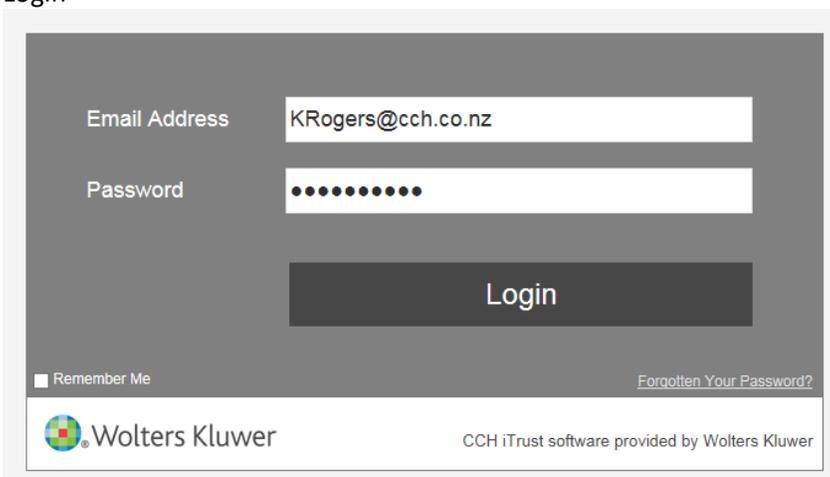
3. Login

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.

Company selection for individuals with multiple trusts.

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

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

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

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BETA PORTAL

YOUR COMPANY
COMPANY SLOGAN GOES HERE

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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 Certifcate		
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

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	January
Last Filed	05/03/2018 📅
AR Responsible	Directors

View Company Extract

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

Contact Email

To	Test@test.co.nz
Subject	Portal Query: EXAMPLE COMPANY LTD
Message	

Send   Cancel