



CCH iFirm[®]

Document Vault

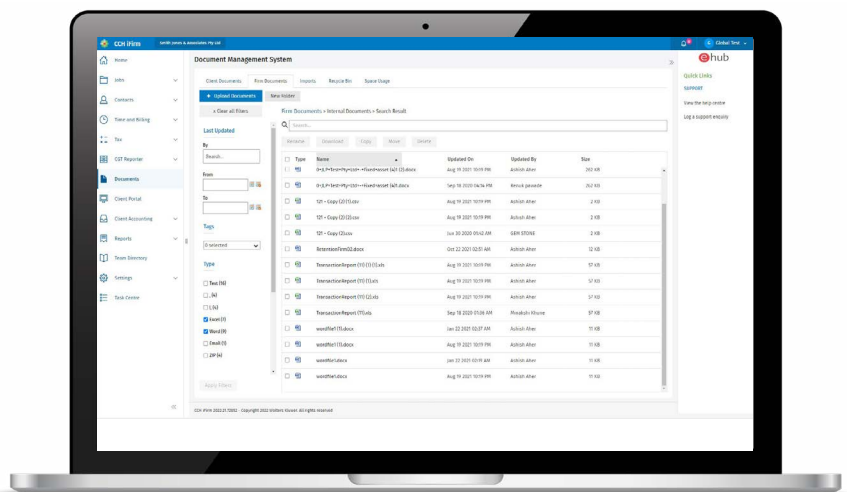
A dynamic, integrated and secure cloud-based solution to simplify and automate the management of your client documents.

Simplify your workflow, automate processes and save time looking for files

CCH iFirm Document Vault is a secure, cloud-based document management system built for the CCH iFirm platform. It provides a centralised client database that allows you to see at a glance all documents related to any client and any client's job.

Review and edit documents with ease via integrations with Office 365 Outlook, Word, Excel and Powerpoint Cloud and Desktop, as well as PDF editing functionality.

Together with other CCH iFirm client collaboration tools, it also facilitates a seamless and secure document exchange and signing experience.





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

CCH iFirm Document Vault features:

Document management:

- ✓ Save documents against a Contact or Job using CCH iFirm Practice Manager (Jobs & Billing)
- ✓ Open and edit documents directly from CCH iFirm using MS Office Cloud or Desktop
- ✓ Set document retention dates enabling storage of all files (including emails) to the entire legal timeline
- ✓ Easily edit PDFs in the cloud
- ✓ Manage access and control who can do what with documents
- ✓ Unlimited document versions – copy, download or revert to previous version
- ✓ Tag documents – apply and retrieve by tags, auto append tags based on job type
- ✓ Automatic or manual creation of folders
- ✓ Automatic back up
- ✓ Deleted documents held in the recycle bin are reviewable and retrievable

Email management:

- ✓ Smart filing of emails to Contacts, and/or Jobs in CCH iFirm Practice Manager
- ✓ View email conversations in Contacts
- ✓ View job-specific email conversations in Jobs in CCH iFirm Practice Manager

Integration and workflow:

- ✓ Store documents against Contacts and Jobs in CCH iFirm Practice Manager to easily access all relevant information from one location
- ✓ Two-way integration through the CCH iFirm Client Portal; share documents with clients for their review
- ✓ Automatic filing of client documents created from templates within CCH iFirm Intranet

Security:

- ✓ Best of breed Microsoft Azure Cloud server located in Australia
- ✓ CCH iFirm security standard: ISO27001 certification

For more information contact us today →

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