
CCH iFirm® Customer Reference Guide

Thank you for purchasing CCH iFirm, the award-winning cloud-based firm management solution that lets you monitor and streamline every aspect of your tax and accounting business. We are pleased to count you among our valued customers and wish to make your experience with CCH iFirm as enriching as possible. Use this guide to get started.

What Happens Next:

1. Welcome Email: you will receive an e-mail with the subject: Welcome to CCH iFirm. It will include steps to access your CCH iFirm site for the first time.
2. Register for training from this link: [CCH iFirm Training](#)
3. Access short videos here: [CCH iFirm video library](#)
4. Access the Learning Portal by clicking the Training menu from the [ATX™](#) or [TaxWise®](#) Solution Center. Log in with your Solution Center credentials, if prompted.

How to Reach Us:

Phone: 1-877-326-2274

Chat: [ATX](#) or [TaxWise](#)

Web ticket: [ATX](#) or [TaxWise](#)

Frequently Asked Questions:

Q: How do I reset my CCH iFirm password?

A: Click on the “Forgot your password?” link on the login page.

Q: I need to add more licenses or another module; who do I contact?

A: Please contact your account manager.

Q: How often is CCH iFirm updated?

A: Updates are performed on a routine basis and Wolters Kluwer is responsible for version updates, enhancements, security and performance improvements.

Q: How do I know when enhancements or changes have been made?

A: All CCH iFirm changes are posted in the Announcements section of your site.

Q: Some of my staff requires additional training; who should I contact to organize this?

A: Please contact your account manager.