

# Cch Portal User Guide

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### **Cch Portal User Guide**

This document is intended for CCH Customers licensed to use CCH Axxess Portal. The document is a template ready for customers to customize and distribute to their clients. To begin, search for "FirmName" and replace with the actual business name. Customize the cover page and text within the guide as appropriate to meet your firm policies.

### **CCH Axxess Portal Client User Guide**

The Portal Admin is the primary user for each Client Axxess portal. The Portal Admin may perform all portal- related functions, create other Portal Users and control access for other Portal Users. The Portal Admin user will be the only user that exists initially when a portal is created.

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This guide is designed to provide guidance on how to prepare for the introduction of a client portal to your practice, and describes the steps you need to undertake to get up and running with CCH Portal. It assumes that you are familiar with the Microsoft Windows environment, and can perform basic tasks within CCH Central.

### **CCH Portal 2017.1 User Manual and Getting Started Checklist**

- The Portal Admin is the primary user who has access to the portal. The Portal Admin may perform all portal-related functions, create other Portal Users and control access by other Portal Users. The Portal Admin user will be the only user that exists initially.

### **CCH Axxess Portal Client User Guide - Harrington Group**

Edit or Delete a Portal User Access to a Portal may be modified or terminated at any time. In the Manage Users window, click the box to left of the user's name, and then click the More Options button to delete the user, or click the Edit button to modify. It is important to terminate access when no longer needed by the Portal User.

### **CCH Access Portal Client User Guide**

Introduction to Your Portal CCH Access Portal is an easy-to-use tool that allows the firm to securely exchange files with you using an intuitive folder structure, just like on your computer. You will receive email notifications when a portal is created for you that include a link to your portal and your temporary password.

### **Knowledge Base Solution - CCH Access™ Portal Quick Start Guide**

This document is intended for Wolters Kluwer customers licensed to use CCH Access™ Portal. The guide is a template in Microsoft® Word format so it can be edited to add your firm's branding and messaging. Then it can be emailed to clients and attached to new user email notifications. Instructions for customizing this document are outlined below.

### **Knowledge Base Solution - CCH® Client Access User Guide**

CCH Access™ Portal: 2019-1.0 Release Notes; What is 2-Step Verification for CCH Access™ Portal and CCH® Client Access? How do I log in to a new device using 2-step verification in CCH® Client Access? How do I reset my CCH Access Portal login password? How do I create a new portal using the standalone version of CCH Access™ Portal?

### **Wolters Kluwer Tax & Accounting Support**

Welcome to your Portal! Account Login The Silverlight plugin is no longer supported in this web browser . Use Internet Explorer to continue accessing the Silverlight portal, or click here to access the non-Silverlight version Client Access using this browser. × The Silverlight plugin is disabled in Mozilla Firefox ...

### **Portal**

Click to open the CCH® ProSystem fx® Tax User Guide. This guide includes the following chapters: Chapter 1, Planning Your System, helps you plan for optimal installation, maintenance, and performance. This chapter covers system and printer configuration, network information, performance tips, and includes a preseason checklist.

### **Knowledge Base Solution - CCH® ProSystem fx® Tax: User Guide**

The Portal Admin is the primary user who has access to the portal. The Portal Admin may perform all portal- related functions, create other Portal Users and control access by other Portal Users. The Portal Admin user will be the only user that exists initially.

### **CCH Access Portal Client User Guide - Warady & Davis**

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### **Client Access**

Create Portal User Assign a user to a Portal 1. All portals will be displayed, check the Grant Access box to allow access to a Portal. 2. Assign a File Management Role for Portal Users to the selected Portal. 3. Select Save to create the Portal User. Emails containing login information will be sent to the login ID (email address) of the Portal User. 1 2 3

### **CCH Access Portal Client User Guide - Corrigan Krause**

How do I access the CCH Access Practice user manual? Help Files can be accessed by clicking on the "?" on all screens or by clicking on "F1." Solution Tools. Email Print. Attachments. Solution Id: 000033490/sw29135: Direct Link: Copy To Clipboard: To provide feedback on this solution,

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### **How do I access the CCH Axxess Practice user manual?**

ProSystem fx PortalClient User Guide This document is intended for CCH Customers licensed to use ProSystem fx Portal. The document is a template ready to be customized and distributed to clients. To begin, search for [Firm Name] and replace with the actual business name.

### **ProSystem fx PortalClient User Guide**

Portal Admin The Portal Admin is the primary user for each client Axxess portal. The Portal Admin may perform all portal- related functions, create other Portal Users and control access for other Portal Users. The Portal Admin user will be the only user that exists initially when a portal is created.

### **Client Axxess User Guide - Saville, Dodgen & Company**

Edit or Delete a Portal User Access to a Portal may be modified or terminated at any time. In the Manage Users window, click the box to left of the user's name, and then click the More Options (ellipsis) button to delete the user, or click the Edit button to modify. It is important to terminate access when no longer needed by the Portal User.

### **CCH Axxess Portal Client User Guide - Fitts Roberts Kolkhorst**

A Portal User ID and login instructions are provided to each Argent client via email. All documents made available to each client on the Argent CCH Client Axxess Portal can be printed or transferred to another file on your computer or permanently deleted by you as you see fit.

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