

## CCH iFirm Account Onboarding into OnePractice Sync

- 1. First, 2 credentials would be needed:
  - A M365 account with
    - At least a Business Premium/E3/M3 license
    - Has at least SharePoint Site Administrator privileges on the SharePoint\Document Centre\ site
    - Has permission to Consent for Apps
  - o An account with access to the CCH iFirm clients list
- 2. Go to https://www.tribetech.com.au/ops
- 3. Click on Login with Microsoft login with the M365 account
- 4. If you get a "Permission Requested" prompt click the [Accept] button



## 5. Select the correct Document Center and click [Configure]

elcome, MOD		
elect Sharepoint Document Center	Q	Search
m365x081160.sharepoint.com - (https://m365x081160.sharepoint.com)	Not set	Configure
documentcenter (https://m365x081160.sharepoint.com/documentcenter)	Not set	Configure
Clients - (https://m365x081160.sharepoint.com/Clients)	Not set	Configure
ContosoBrand - (https://m365x081160.sharepoint.com/sites/ContosoBrand)	Not set	Configure
Retail - (https://m365x081160.sharepoint.com/sites/Retail)	Not set	Configure
allcompany942 - (https://m365x081160.sharepoint.com/sites/allcompany942)	Not set	Configure
GlobalSales - (https://m365x081160.sharepoint.com/sites/GlobalSales)	Not est	Configure

## 6. Enter the iFirm URL

- URL usually is <u>https://<customer>.acclipse.com</u>
- Ignore webhooks for now they don't appear to work on older tenancies
- Advisable to leave inactive clients disabled as adds unnecessary load on sync

## 7. <u>Click on [ Connect CCH ]</u>

CCH iFirm
CCH iFirm URL
Enable webhooks
Include inactive clients
Leave unchecked unless absolutely required - can increase sync load significantly
Connect CCH

8. Allow OPS' access to the customer's iFirm Account by clicking on [Yes]

The app is requesting acce	ess to your iFirm account.	Allow access
CCH iFirm Microsoft Office Addins PRACTICE MADE PERFECT	iFirm Microsoft Office Addins remote access	Allow iFirm Microsoft Office Addins remote access access to your ifirm account?
	Allow the iFirm Microsoft Office Addins access to iFirm to provide contact information.	If you grant access now, you can revoke it at any time by visiting your account page.
		Yes

9. The system will perform several tests. Once these are complete, you can close the sync tool

Depending on the number of clients you have this may take some time to complete, however in the first few minutes your clients will start to synchronise, and the platform will work

10. The result should look like this (Full Sync will be YES if this is the very first sync)

CCH Sync Registration	n
Sync registration com	pleted!
After processing full initial sync, y	our scheduled s
Test retrieve from CCH Success	
Test retrieve from SharePoint	uccess
Requires full initial sync No	