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CRM functions. The application can be accessed via most modern browsers, with no software maintenance or updates.

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[\[Read more on CRM for accounting firms.\]](#)

CCH iFirm offers cloud-based CRM and practice management for smaller accounting firms, providing project and engagement management tools for tracking the full life of client engagements.

Strengths

- The totally online system offers convenience of anytime, anywhere access

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A cloud-based system, CCH iFirm is a user-friendly program that provides advanced CRM functions. The application can be accessed via most modern browsers, with no software maintenance or updates.

The system's Job Management functions offer a single interface for managing client engagements and WIPs, with at-a-glance data on the staff member assigned, the duration, and due date, and a variety of views for looking at engagement productivity. The system offers easy access to prior-year data for budgeting and staffing purposes. Users can create alerts that will notify them by email of deadlines.

Contact management functions offer data screens that simplify tracking of clients, multiple contacts, leads, vendors, suppliers and other relationships, with customization options and the ability to assign client contacts to specific firm managers, partners or other staff. Clients can also be assigned to groups. Detailed client information tracking includes email, phone numbers, address, and social media. Users can track jobs, engagements, fees, WIPs and billing information, notes and custom data fields.

A dashboard offers access to key performance indicators for the firm, with various tools for digging into WIP and AR by group, productivity, overdue tasking and period-over-period revenue.

Summary & Pricing

Subscription pricing is based on number of users: 1–3 users \$999, 4-6 users \$1,799, 7-10 users \$2,499.

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