# 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
   - 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
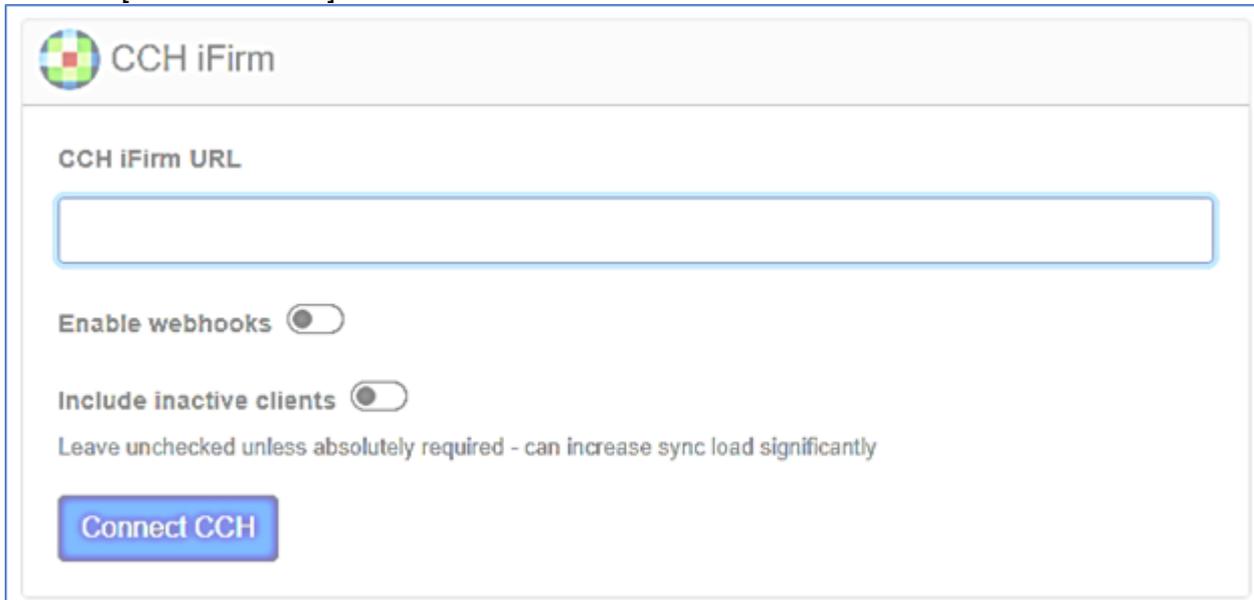4. If you get a "Permission Requested" prompt – click the [Accept] button
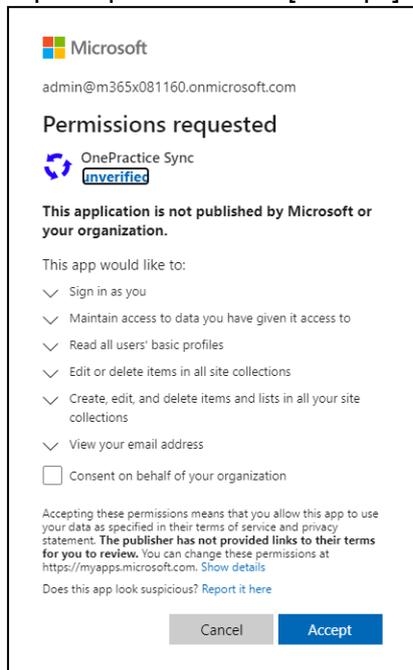
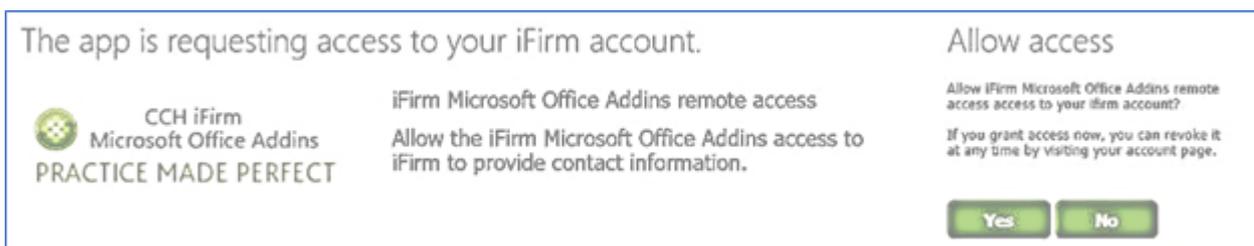5. Select the correct Document Center and click [Configure]
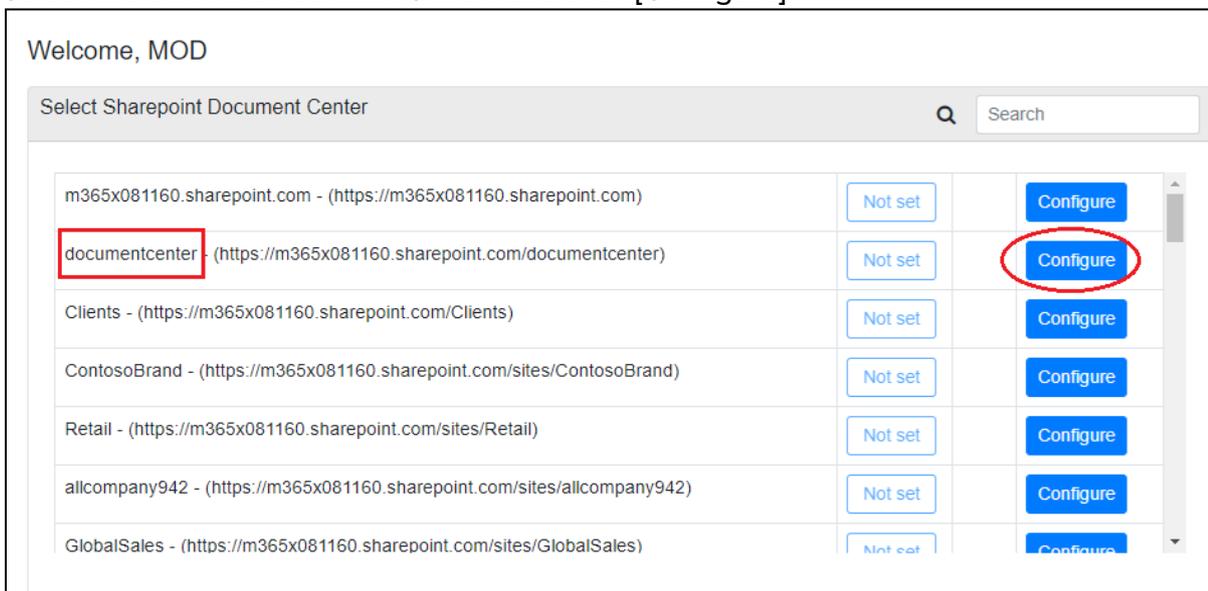
6. Enter the iFirm URL
   - URL usually is https://<customer>.acclipse.com
   - Ignore webhooks for now they don't appear to work on older tenancies
   - Advisable to leave inactive clients disabled as adds unnecessary load on sync

7. Click on [Connect CCH]

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