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Mary Girsch-Bock • Aug. 18, 2016

- Both products offer excellent integration capability with all Wolters Kluwer products including CCH Axcess and ProSystem *fx*
- Products are similar in both navigation and functionality
- Product contains solid document retention capability
- Integration with the product portal allows firms to send and receive documents safely and securely.

Potential Limitations:

- Those not using the integrated suite of CCH programs from Wolters Kluwer will not realize the same level of productivity enhancement

Wolters Kluwer CCH

www.cchgroup.com

800-344-3734

Basic System Functions 5 Stars

CCH Axcess Document and CCH ProSystem *fx* Document are the two document management products offered by Wolters Kluwer Tax & Accounting US. Both products offer similar functionality, with the main variable being that ProSystem *fx* is deployed on-premise, with Axcess completely cloud-based

Both products offer easy product accessibility from the Dashboard, which can be customized to display only the features and functionality desired. Users can access the document portion of the application from the tab at the top of the screen, while recently accessed files are displayed below. Users have the option to look up clients by name or Client ID, or simply click on a recent client name to access the client's file list. Once a client is chosen, the related documents are all displayed onscreen for easy

Advanced Management and Archiving Features 5 Stars

Both CCH Axcess Document and CCH ProSystem *fx* Document allow firms to easily implement a document retention policy, with users able to specify how long to retain documents, with a permanent option included for files that should be retained indefinitely, ensuring that firms are in compliance with regulations. Archival file groups can also be created, and individual documents assigned to a specific group, making it easy to manage like documents and their expiration dates. The version control feature helps to ensure that authorized users have access to the most recent document, avoiding mix-ups and duplicate work. Both products also offer document check in and check out so firms will always know where documents are at any given time. Users also have the option to easily edit stored documents directly within the application. All documents stored in either product can be indexed by simply assigning specific criteria to the document, including Class, Subclass, Client, Document Type, or Year.

Client Collaboration Tools 5 Stars

The CCH Axcess Portal allows users to easily share documents with clients safely and securely. Not limited to only CCH Axcess Document, CCH ProSystem *fx* Document users can easily utilize the portal application as well; sharing documents including tax returns, financial statements, source documents and even QuickBooks files. Using the portal, clients can also upload documents that can be easily added to either system. A Microsoft Outlook plug-in allows users to drag-and-drop documents from within Outlook, so users can use the drag-and-drop feature to save both emails and attachments directly in the client folder. The Share Safe option which is included in the CCH Axcess Document product allows users to share documents directly with clients or third parties without using a client portal.

Integration 5 Stars

ProSystem *fx* applications including CCH ProSystem *fx* Tax, CCH KnowledgeConnect, and CCH ProSystem *fx* Engagement. Both products also offer complete integration with other Wolters Kluwer Tax & Accounting products. In addition, both products offer complete integration with Microsoft Office as well. Integration with CCH ProSystem *fx* Scan allows users to easily scan documents directly into Document. Users can easily drag and drop files between Document, Outlook, Windows Explorer, and Workstream, with all documents securely encrypted during transit.

In addition, CCH Axcess Document's open integration platform allows the product to offer solid integration with various third-party applications as well, while CCH ProSystem *fx* Document integration is more restricted, but does offer good integration with other Wolters Kluwer products,

Support/Help 5 Stars

Users of both products can easily access product support options directly from the user dashboard, as well as via the Wolters Kluwer website. Wolters Kluweroffers a variety of tools to support new users, including the CCH Support Center, where users can access direct product support, as well as an online database that contains critical known issues, step-by-step instructions, and additional product documentation. Support can be accessed in a variety of ways including web chat, via telephone, or web ticketing. Product training options include both Setup and End User Training. For accountants that are looking for self-study and CPE credits, the CCH Learning Center offers over 350 online self-study courses.

Summary & Pricing

While either CCH Axcess Document or CCH ProSystem *fx* Document can be used as a stand-alone system, both products offer additional benefits if used with other Wolters Kluwer applications. For accounting firms already using Wolters Kluwer

products, CCH ProSystem *fx* Document will be a welcome addition, offering solid

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