functionality and a more integrated solution.

Mary Girsch-Bock • Oct. 20, 2017

CCH Axcess Portal

Wolters Kluwer Tax and Accounting

available for iPhone, iPad, and Android devices, CCH Axcess Portal offers users the ability to securely share documents with clients. The portal is customizable, so accounting firms can easily add a logo or other branding materials along with custom contact data for the portal.

Users can access CCH Axcess using any web browser, with users able to quickly and easily upload a variety of documents using the drag-and-drop interface. The interface also provides users with a list of all current clients, so users can simply choose a client in order to access or upload documents. For those looking for a more streamlined experience, they can utilize CCH Axcess Portal's Client Axcess Interface, which provides a quicker, more efficient way to upload documents and download any files received from clients or colleagues. Portal users can easily check out documents stored on the portal in order to prevent unauthorized changes. And for those outside the office, the CCH Axcess Portal supports mobile web browsers and offers mobile apps for iPhone, iPad, and Android users, so files can be accessed from anywhere.

Convenient for both accountants and their clients, CCH Axcess Portal offers bi-directional capability, making it easy to both send and receive files. Both firm users and clients can share files of any size without restrictions, and CCH Axcess Portal supports a variety of file types including PDF, web pages, hyperlinks, Microsoft Word, Microsoft PowerPoint, Microsoft Excel, as well as QuickBooks files.

Search capability is excellent in CCH Axcess Portal, with users able to search portal documents by file type, creator name, or keyword. The product also offers an optional email notification tool that will notify both firm employees and clients whenever a document has been uploaded to or downloaded from the portal. In addition, users can be notified when the file itself has been accessed.

Firms have complete control over which clients have access to documents in the

documents for years to come.

All documents are stored on servers at CCH Axcess Portal's Class 4 data center, which uses TLS 1.2 encryption with password protected access. All files are immediately encrypted once they are uploaded and remain encrypted during file transmission and when the file is inactive. In addition, all files are automatically scanned for viruses before being saved on the server. As an additional safeguard, users can designate all files as a Read Only file to protect the file from unauthorized editing.

CCH Axcess Portal integrates seamlessly with other CCH Axcess modules which include CCH Axcess Practice, CCH Axcess Document, and CCH Axcess Tax. In addition, the product also integrates with CCH® ProSystem fx® Engagement and CCH® ProSystem fx® Document. An open integration platform helps to ensure smooth integration with many third party applications.

CCH Axcess Portal offers a variety of support options that are easily accessible from the user interface. Wolters Kluwer support includes access to hot support topics, FAQ's, access to various guides, and the ability to search the system for answers to questions. Training options vary, with product training available, as well as a variety of online self-study classes available.   Product support is available during regular business hours, with support accessible from the website or via chat. Telephone support is also available.

CCH Axcess Portal can be an asset to accounting firms of any size. While suitable as a stand-alone application, CCH Axcess Portal can be particularly beneficial to those already using other Wolters Kluwer applications. CCH Axcess Portal pricing varies, starting at around $700.00 per year, with custom pricing provided for each accounting firm.

2017 Rating 5 Stars

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