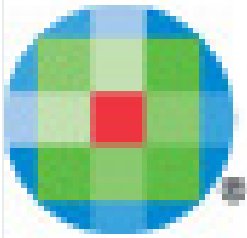


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to create a website using CCH Site Builder. New users can try out the system for 30-days, with a website created from basic registration information.

Mary Girsch-Bock • Jul. 18, 2016



Wolters Kluwer

www.cchwebsites.com

Best Fit: The product is well suited for small to mid-sized accounting firms that currently or plan to utilize Wolters Kluwer products. An additional benefit is the use of CCH Axxess Portal, which can be embedded into any Wolters Kluwer website for client file sharing.

Product Strengths:

- Offers an excellent selection of accounting and tax related tools and articles for clients
- Product is easily customizable and offers a good selection of styles and templates
- Quick product setup allows a website to be created and live quickly
- Offers solid integration with other CCH Axxess product to extend product functionality

Potential Limitations:

- Product does not offer blogging capability

EASE OF USE 5 Stars

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a web style, takes users through each of the default pages that are included in the created website, including Site Branding, where users can easily upload a custom logo or other branded materials for their firm.

The product offers a good variety of standard pages, including Welcome Page, Firm Profile Page, Client Services Page, Information Center Page, Newsletter Page, an Interactive Financial Tools Page, Links Page, and a Contact/Information Page. Additional standard content is also available, including an Events Calendar, Client Tax Organizer and IRS Forms links can be added to the page easily. Premium content such as Financial Planning Toolkit, CCH Tax Guide and Business Owners Toolkit are also available at an additional cost.

TEMPLATES/CUSTOMIZATION 4.5 Stars

CCH Site Builder offers a variety of website templates to choose from. In addition to those styles, users can add custom headers, background, footers, and custom logos and other materials to further create a custom website. Once a style has been chosen, users can fully customize each page, or leave information as is and update at a later date. This flexibility allows users to quickly customize important pages such as firm information and services and leave other pages to be customized (or not) at a later date. Along with custom logos, firms can also add videos and other images to the website if desired.

For firms that want a fully custom website, CCH Site Builder also offers completely custom site, firms can opt to use the specialized design services that Wolters Kluwer offers, with a quote available by contacting the company directly.

AUTOMATED CONTENT 5 Stars

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available include self-employment taxes, mortgage calculations, estate tax planning, tax estimates, and others. Users can also add a series of links to financial and tax related websites such as SSA, IRS, and state tax agencies can also be added to a firm's website.

MARKETING/SEO/CLIENT TOOLS 4.75 Stars

During the website creation process, users can use the Client Services menu to choose the services that their firm will offer, eliminating the need to set up each service individually. CCH Site Builder also contains a series of interactive modules designed to boost communications between firms and clients. Modules include an Appointment Scheduler, where users can request an appointment directly from the website. Those using CCH Axxess Portal will be able to safely and securely share files with clients or can use CCH FileShare, which allows users to upload and store documents, data files, and spreadsheets. CCH FileShare also allows users to easily share relevant documents with clients, partners, and associates.

Setting up Social Media options is easy, with users able to choose which media sites they wish to connect with during the product setup process, with easy integration with Facebook, Twitter, LinkedIn, and YouTube. Users can also offer clients easy online payment capability by integrating their website with PayPal. An email marketing tool is also included in the product and offers firms the ability to create and manage an email list of clients and potential clients, with the ability to send out notifications, newsletters, and other information as needed.

CCH Site Builder also integrates with Google Analytics and other popular search engine optimization tools, so users can be assured that their website will be easily available and accessible. The product also offers users free domain hosting, with firms able to choose a custom domain name. Five email accounts are included with CCH Site Builder, with additional email addresses available at an additional cost.

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SUMMARY & PRICING

CCH Site Builder is an excellent choice for small to mid-sized accounting firms. Available as a stand-alone product, users already or planning to use other Wolters Kluwer products will reap additional benefits. CCH Site Builder is available in both basic and standard editions, with users able to subscribe to additional services such as CCH eContent at an additional cost. CCH Site Builder starts at \$785 annually.

2016 Rating 4.75 stars

Firm Management • Technology

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