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accounting firms of any size that are currently using other CCH Axxess applications. Both products can be used as stand-alone applications as well.

Mary Girsch-Bock • Dec. 18, 2017



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features and functionality, with the main difference being deployment options, with CCH ProSystem *fx* Document an on-premise solution, while CCH Axcess Document is a cloud-based application that also offers a mobile app for easy access to documents from any location.

Both products offer users easy system access directly from the user dashboard, where documents can be accessed, as well as Recent Files, Recent Entities, File Groups, Checked Out Files, and other options. Document Central is where users can access documents, search documents, or click on a file name for quick access. When choosing a client, all related documents for that client are displayed on screen, so users can quickly locate the document or documents desired.

All documents are stored in their native format, and users can index documents by assigning them to a certain category, such as Class, Subclass, Client, Document, or Type. Both products utilize a simplified database that is easily searchable using a variety of criteria including client, file or document keyword, file name, classes, and subclasses, with CCH Axcess Document users able to search and access documents using any device including smart phones and tablets.

Along with document storage, both CCH ProSystem *fx* Document and CCH Axcess Document offer a variety of document management features, including document locking, document check in and check out, version control, direct editing, and overdue notifications. Users can implement a document retention policy, specifying how long to retain each document, with an option to retain files permanently. Users of CCH Axcess Document can use CCH ProSystem *fx* Scan, which offers enhanced features for integration and routing of scanned documents directly into either product. Both products also offer excellent document archiving, with users able to create archive groups in order to better manage similar documents and their expiration date. A Microsoft Outlook plug-in is available in both products as well, so

users can simply drag and drop documents from Outlook directly into a client

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share documents by storing the documents on the CCH Axxess server and provide clients with a key in order to access documents.

CCH Axxess supports Transport Layer Security (TLS) 1.2 encryptio, with users only able to access any stored documents with a unique user name and password. All files are encrypted immediately upon being uploaded into CCH Axxess Document, and remain encrypted at all times, even when being shared. In addition, all document and files are automatically scanned for viruses prior to being stored in the product.

CCH Axxess Document is part of the CCH Axxess Suite of applications, including CCH Axxess Portal, CCH Axxess Practice, CCH Axxess Workstream, and CCH Axxess Tax, with all applications using a core database for seamless integration. CCH ProSystem *fx* Document is part of the CCH ProSystem Suite of applications which include CCH ProSystem *fx* Tax, CCH ProSystem *fx* Engagement, and CCH KnowledgeConnect. Both products offer integration across product lines as well as integrating with Microsoft Office. CCH Axxess Document also offers an open integration platform which allows integration with third party applications as well.

Both products offer a variety of help and support tools for system users, which includes accessing additional Help options directly from the user dashboard. The Wolters Kluwer Tax & Accounting website also offers access to the CCH Support Center, where users can access product support, the CCH online database, and additional product documentation. Product support is available via telephone, chat, or web ticketing, with users logging in to access the various support options. Hot topics and FAQ's are available as well. A video library is available for all Wolters Kluwer applications as well and training webinars are available for new product users, along with a new user orientation is available as well. For those looking for CPE courses, Wolters Kluwer offers access to more than 400 self-study classes as well as Wolters Kluwer Webinars designed for professionals.

Both CCH ProSystem *fx* Document and CCH Axcess Document offer excellent

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