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CCH Axcess Portal

<https://taxna.wolterskluwer.com>

From the **2018 reviews of client portal systems** for accounting firms.

CCH Axxess Portal can be a useful addition to accounting firms of any size. The

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CCH Axxess Portal can be easily customized, with firms able to brand the portal with their logo, colors, and other firm-specific details.

CCH Axxess Portal contains a drag-and-drop interface, making it easy to upload, retrieve, and manage documents on the portal. Firms can designate files as Read Only or Read/Write for security purposes, and documents can be checked out to eliminate multiple versions of a document being circulated. Users can easily search for documents using a variety of search criteria including file type, title, keyword, or creator. All folders containing documents can be assigned specific security levels, restricting access to only authorized colleagues and clients.

Designed for both accounting professionals and their client base, CCH Axxess Portal offers bi-directional file exchange capability while supporting a variety of file types, including PDFs, web pages, hyperlinks, Microsoft Excel, Word, and PowerPoint files, Microsoft Visio diagrams, and now, even QuickBooks files.

Along with excellent search capability, CCH Axxess Portal also includes an email notification tool where portal users will be notified via email when a document has been uploaded to or downloaded from the portal. A notification will also be provided when the file is accessed.

Firms can easily control document access by clients, determining which clients can access documents via the portal by sending the client an email that contains a link to the portal setup, along with firm-branded instructions on how to use the portal. Additional security measures can be attached to any of the documents, tax returns, photos, and other items stored on the portal. Clients also receive access to a welcome tour that can be viewed at any time. Depending on the level of access provided, clients can in turn provide portal access to their own employees. CCH Axxess Portal supports files up to 2 GB in size.

CCH Axcess Portal also provides excellent document storage capability, allowing

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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 trending support topics, FAQ's, along with 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 invaluable for firms that want a secure method to exchange files with clients. While the portal can be used as a stand-alone application, integration with other CCH applications such as CCH ProSystem *fx* and CCH Axcess Practice increases product functionality. CCH Axcess Portal provides custom pricing for each accounting firm, with costs generally starting at around \$700.00 per year.

2018 Rating 5 Stars

Accounting

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