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Wolters Kluwer

CCH Axxess Document

Wolters Kluwer

<https://taxna.wolterskluwer.com/professional-tax-software/axcess/document>

From the 2020 reviews of Document Storage and Document Management systems.

CCH Axxess Document from Wolters Kluwer is well suited for accounting firms of any size. While users will experience greater functionality when used with other Wolters Kluwer applications, CCH Axxess Document can also be used as a stand-alone document management application.

CCH Axxess Document is a cloud-based application that includes a mobile app that allows users to access and manage all documents from their smart phone or tablet. (For those looking for an on-premise solution, CCH ProSystem *fx* Document is available from Wolters Kluwer as well.)

The CCH Axcess Document dashboard is completely customizable, and users are able

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file hyperlink can be copied, with the option of inserting the link into another document.

CCH Axcess Document offers excellent management tools for accounting firms, including easy document lookup, document check-in and check-out, file versioning, direct editing of any document, and a file overdue notification which alerts users if a file is checked out longer than scheduled. Firm managers can also create and set a document retention policy that can be used firm wide. Authorized users will always be able to view exactly where a file is at any time, and good search options enable users to search for documents using a client name, file name, document name, keyword, document class or subclass in the search process.

During the product setup process, managers can establish file naming conventions, with the ability to add classes or subclasses to documents as well. Each new user is automatically subscribed to a pre-defined folder template, users are able to create additional templates as desired. Once a document has been uploaded to a folder, the folder template cannot be changed. CCH Axcess Document also offers complete audit trail functionality in the application, displaying which documents have been accessed as well as any changes that were made.

The biggest drawback to CCH Axcess Document is the lack of a scanning option, but users can integrate the application with CCH ProSystem *fx* Scan if scanning a document is necessary. Scanned documents can be imported directly into the application.

For secure sharing of documents with clients, users will need to subscribe to CCH Axcess Portal, which offers bi-directional file sharing capability, with users able to share to a client portal directly from CCH Axcess Document. Users can also publish a file to the portal if desired. Users can add new portal users, edit an existing user, or delete a portal user as needed.

CCH Axcess Document includes 256-bit Secure Socket Layer encryption, with

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with Microsoft applications such as Word and Excel. The product uses an Open Integration Platform for integration with third-party applications.

CCH Axcess Document users can access the product support page, which includes product videos, a searchable knowledge base, an FAQ page, and direct access to the product help page, which includes getting started options, and help in working with files, managing files, and searching for files. Users can log in to open a support case or contact support via telephone, email, or chat. Users can also request a remote support session for more difficult issues.

CCH Axcess Document is a cloud-accessible document storage and management application that's suitable for accounting firms of any size. CCH Axcess Document offers excellent integration with other Wolters Kluwer applications which include both CCH Axcess and CCH ProSystem *fx* applications. Pricing for CCH Axcess Document is available directly from Wolters Kluwer upon request, with add-on applications priced separately.

2020 Rating – 5 Stars

Strengths:

- Excellent integration with other CCH Axcess and ProSystem *fx* applications
- Product is accessible from within tax preparation applications
- Includes an Open Integration Platform for integration with third-party applications

Potential Limitations:

- Better suited for firms using other Wolters Kluwer applications
- Lack of a scanning option

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