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CCH Axxess Document
www.cchgroup.com

From the **2018 reviews of Document Management and Documents Storage Systems** for accounting firms.

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access the document. Users can also access a specific client and view and access any document associated with that particular client.

All documents in CCH Axcess Document are typically stored in their native format and users can easily create folder templates for future use, either by starting with a file structure from scratch or copying an existing template for modification.

Mentioned earlier, users can easily search for a document in the application by using the client name, a file or document name or keyword, or even the document class or subclass.

Along with solid document storage capability, CCH Axcess Document offers solid document management capability with features such as document check-in and check-out, version control, direct document editing, and locking capability. Using version control, users can restore older versions of a file, and if authorized, view the audit trail that displays all changes made to a document, as well as who made those changes. There is also an option to create a document retention policy firm-wide, that allows users to determine how long documents need to be retained, and once expired, if the document should be permanently archived. For better document organization, users can create multiple groups for similar documents, making it easy to assign a retention policy and expiration date. CCH Axcess Document also includes a Microsoft Outlook plug-in that allows users to save emails using drag and drop functionality, storing emails as a client document, along with any related email attachments.

Those that wish to scan documents will need to use CCH ProSystem *fx* Scan to scan the documents and then import them directly into CCH Axcess Document with documents organized and bookmarked.

The optional CCH Axcess Portal offers users the ability to easily publish documents directly to the portal, while providing clients with user-defined access to the portal

in order to access the documents or upload their own documents. For those that

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up daily, and off-site recovery tools are available if necessary.

CCH Axxess Document is part of CCH Axxess Suite of applications which includes CCH Axxess Tax, CCH Axxess Practice, CCH Axxess Portal, CCH Axxess Workstream and CCH Axxess Data Insights. All products in the suite are designed to integrate for a complete tax, practice management, and document management system. The product also integrates with CCH ProsSystem *fx* applications as well as Microsoft Office applications such as Word and Excel.

CCH Axxess offers a variety of tools and resources for users, including access to the CCH Axxess Document Knowledge Base, product release notes, and any product updates. Users can view a variety of support topics, search FAQs, and access a product guide if desired. Product support is available during regular business hours via telephone, chat, or through the website, where users can also manage support requests or start a remote support session. A video library is available for registered product users and webinars and a new user orientation are available as well.

CCH Axxess Document is a good fit for accounting firms of any size, particularly those currently using or planning to use other CCH Axxess applications. CCH Axxess Document offers solid document storage and management capability, as well as seamless integration with other Wolters Kluwer applications. Pricing for CCH Axxess Document is available directly from the vendor, with all integrated applications priced separately.

2018 Rating – 5 Stars

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