Wolters Kluwer

CCH Axess Document

Wolters Kluwer

https://taxna.wolterskluwer.com/

From the 2019 reviews of Document Management and Storage systems for accounting firms.

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

For product help and support, CCH Axess Document users can access the product support page, which offers Hot Topics, FAQs, and product guides, and well as access to the product knowledgebase, and release notes. Registered users can access a comprehensive video library, with on-demand webinars available as well. On-demand e-learning is also available, and setup and end user training is offered. Product support is available during regular business hours via telephone, email, or chat, though users can also request and schedule a remote support session if desired.

CCH Axess Document seamlessly integrates with other applications in the CCH Axess Suite including CCH Axess Tax, CCH Axess Practice, CCH Axess Portal, and CCH Axess Workstream. CCH Axess Document also integrates with CCH ProSystem *fx* applications, as well as Microsoft Office applications such as Outlook, Word and

Excel. In addition, CCH Axcess Document, like all Wolters Kluwer applications, uses

integrates with CCH Axcess Portal, with users able to easily publish documents directly to the portal. Users can provide clients with access to the portal in order to access documents or upload documents such as source files. Another option for sharing files with clients is Share Safe, which is included in CCH Axcess Document. Share Safe allows users to store files on a secure server and provide clients with a secure key in order to access the documents. Users also have the option to share documents by installing a plug-in that allows users to save client emails directly to CCH Axcess Document.

For Document scanning, CCH Axcess Document offers easy integration with CCH ProSystem fx Scan, including the ability to read, identify and bookmark any client document scanned.

Version control is also included in the application to ensure that users are always accessing the most recent version of any document. The version control feature also allows users to restore a previous file version when necessary. Mentioned earlier, product administrators can create a document retention policy during the setup process to ensure policy adherence across the firm. CCH Axcess Document also offers complete audit trail functionality so managers can always view what documents have been accessed and when.

The product also includes a number of excellent management tools including document locking, document checkout, versioning, direct editing, and a view of overdue checked-out documents. CCH Axcess Document also includes automated document retention capability, so users can set a retention policy that will be used company-wide, and document check in and check out capability allows users to track the location of any document at any time. Search options are good, with users able to search for any document stored in the application by using the client name or ID, file, document name, keyword, or document class or subclass, as well as full text search.

Any document stored in CCH Axcess Document will be stored in their native format,

CCH Axcess Document is a good fit for professional accounting firms of any size; offering excellent document storage and management capability, along with excellent integration options with both Wolters Kluwer applications as well as a variety of third-party applications. Pricing for CCH Axcess Document is available directly from Wolters Kluwer, with all integrated add-on applications priced separately.

2019 Rating – 5 Stars

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Firm Management

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