Tax & Accounting

The Accounting Firm Technology Guide: The Benefits of an Integrated Platform

Wolters Kluwer

Every disconnected system in your firm carries a hidden cost: lost time, inconsistent data, and missed opportunities. When your tax software doesn't talk to your billing system, and your document management lives in a separate silo, your team spends more time managing technology than serving clients.

The solution lies in breaking down these silos.

Integrated platforms like Wolters Kluwer's CCH Axcess™ replace this patchwork approach with unified systems that eliminate productivity-killing busy work, streamline client experience, and give you operational control to grow without everything falling apart. This eBook shows how.

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Improve Efficiency, Client Service, and Performance with Integrated Client Data

Every accounting firm knows the frustration: your team enters the same client details into three different systems while clients get annoyed explaining their situation to multiple staff members. That's where an integrated platform like CCH Axcess makes all the difference. Since everything runs on one cloud-based client database, you enter client details once and they automatically appear wherever your team needs them. Less busy work, happier clients, and hours of your week back.

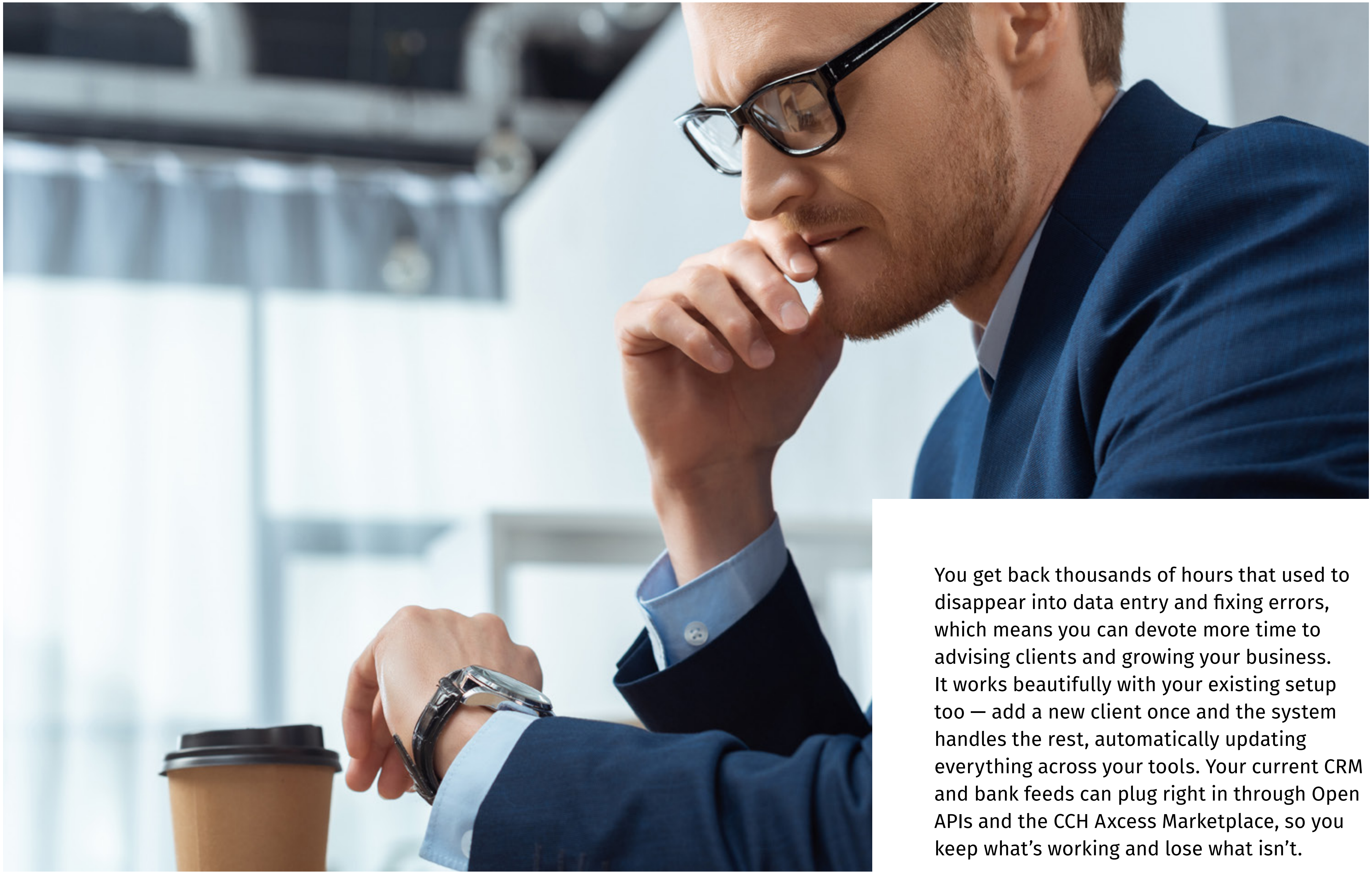
Streamlined Operations Through Unified Client Data Entry

Your firm administrator updates a client's address, and instantly everyone in the firm sees the change — from the tax preparer working on the tax return, to the audit team doing fieldwork, and the partners signing off on everything. A client calls with a new phone number, and it automatically appears in the billing system, tax software, trial balance and document management system. The accounting manager adds a new contact person for a business client, and that information immediately flows to everyone who works on that account.

Most firms know how different this reality is from their current experience. Usually, each change means someone has to remember to update multiple systems — and inevitably, someone forgets. Staff end up working with outdated information, clients get frustrated repeating details to different team members, and simple updates turn into time-consuming headaches.

CCH Axcess works differently because everything runs from one unified client database:

- Client demographics, contact information, and identifiers go in once and flow automatically to all modules, ending the cycle of re-entering the same data across different systems.
- Changes to names, addresses, or other details immediately appear across CCH Axcess Tax™, Practice, Workstream, Engagement and Document, so everyone works with current information.
- New clients entered automatically populate in the Practice, Tax, Engagement and other modules without additional steps, creating seamless handoffs between departments.



You get back thousands of hours that used to disappear into data entry and fixing errors, which means you can devote more time to advising clients and growing your business. It works beautifully with your existing setup too — add a new client once and the system handles the rest, automatically updating everything across your tools. Your current CRM and bank feeds can plug right in through Open APIs and the CCH Axcess Marketplace, so you keep what's working and lose what isn't.

Complete Client Visibility with the Integrated Dashboard

Most firms know this frustrating routine all too well: a client calls asking about their account status, and suddenly three different people are checking three different systems. One person logs into the tax software to see where the return stands, another checks the billing system for payment history, and someone else digs through emails for recent communication. Everyone has part of the story, but nobody has the complete picture.

CCH Axcess changes this completely. Instead of hunting through separate systems or playing detective with client information, the integrated Client Dashboard puts everything you need on one screen:

- Open engagements and upcoming deadlines from Workstream appear alongside current project status, so you can see what's due and when.
- Billing status and accounts receivable aging through Practice show up right next to client contact details, making it easy to address payment issues during regular conversations.
- Linked documents, correspondence, and client Portal activity create a complete communication trail that anyone on the team can access.
- Return statuses and compliance deadlines keep tax workflows visible to the entire service team, not just the preparer.
- Current accounts receivable balances, recent invoices, and last payments update automatically, giving you real-time financial information without manual updates.

Now, when clients call with questions, whoever picks up the phone has everything they need right there. No more “let me check with someone else” or “I’ll have to call you back.” The person answering knows precisely where their projects stand, what invoices are outstanding, and when their next deadline hits. Audit partners, tax preparers, and account managers all see the same complete picture instead of hunting through separate systems to piece together bits of information.

Yet, the real payoff goes deeper than the day-to-day client-serving tasks and involves 360° client visibility. When your team can see everything about a client relationship at once, they catch problems before they blow up. Someone notices an overdue payment during a routine call and can address it right then, rather than discovering it weeks later. Staff spend their days solving client problems and offering strategic advice instead of playing detective with scattered information. You also start seeing opportunities that used to slip through the cracks — like realizing a tax client could use bookkeeping help, or catching potential scheduling disasters before busy season hits.

Firm Management That Scales With Your Success

Running an accounting firm means coordinating multiple moving parts – from managing staff across different locations to maintaining consistent processes and staying updated on client changes. CCH Axcess addresses these challenges through integrated firm management capabilities that work for practices of every size, from 3-person independent firms to 100+ staff international enterprises.

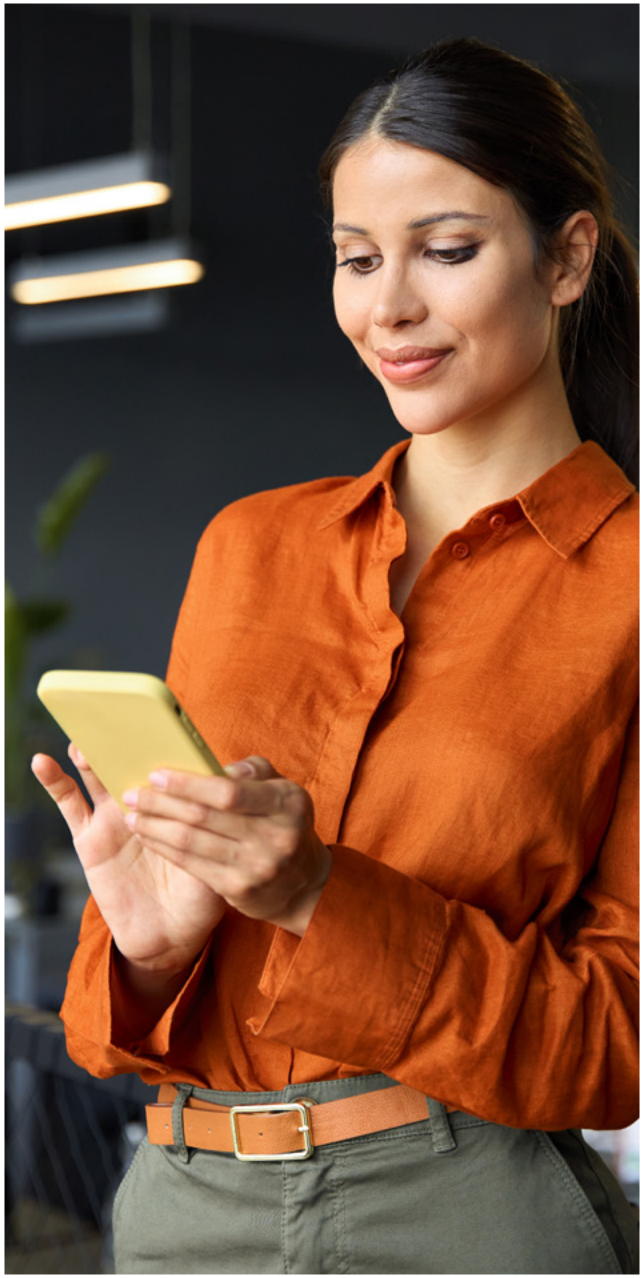
Firm Configuration Options Provide Structure and Flexibility

CCH Axcess lets firms model their exact organizational hierarchy using a flexible hierarchical structure. Administrators can customize the system to match any scenario. A single-office tax practice might set up their system with just 1-2 practice areas within one firm, while a large multi-state firm can define regions, offices, and business units to mirror its real-world organization.

The flexibility benefits anyone and everyone:

- Young independent accounting shops (1–10 staff) can use basic levels initially.
- Growing 11–20 person tax firms can start simple and add complexity as they expand.
- Complex 50+ person full-service firms with tax, audit, or diversified services can scale out multiple levels.

Defining a clear hierarchy in the system streamlines work management. Each client, project, and task rolls up under the correct office or business unit, so staff always see only the work relevant to their location. Partners gain visibility into performance across different areas without wading through irrelevant data.



Centralized Notes and Lists Create Consistency

CCH Axcess eliminates the chaos that happens when different offices use different labels for the same things. Instead of letting each location develop its own system for categorizing clients, tasks, and notes, the platform creates firm-wide consistency through centralized management of lists and notes categories:

- Managing all pick-list values from one central location so every office works with identical engagement statuses, task categories, and note types.
- Defining default note classifications like “Preparer,” “Reviewer,” and “Partner Review” that apply across all organizational levels.
- Building one master set of categories for client industries, service codes, and internal notes that everyone must use.
- Pushing standardized options to every user interface so staff see the same choices whether they work in the main office or a branch location.
- Preventing individual offices from creating variations of categories that would break firm-wide reporting.

When your team uses these standardized lists, you get reliable data that genuinely means something. A “Review Complete” status means the same thing whether it comes from your tax department or audit team. New hires learn one system instead of trying to figure out different approaches at each location. And regardless of firm size, everyone benefits from such consistency. When everyone speaks the same language, your data speaks for itself.

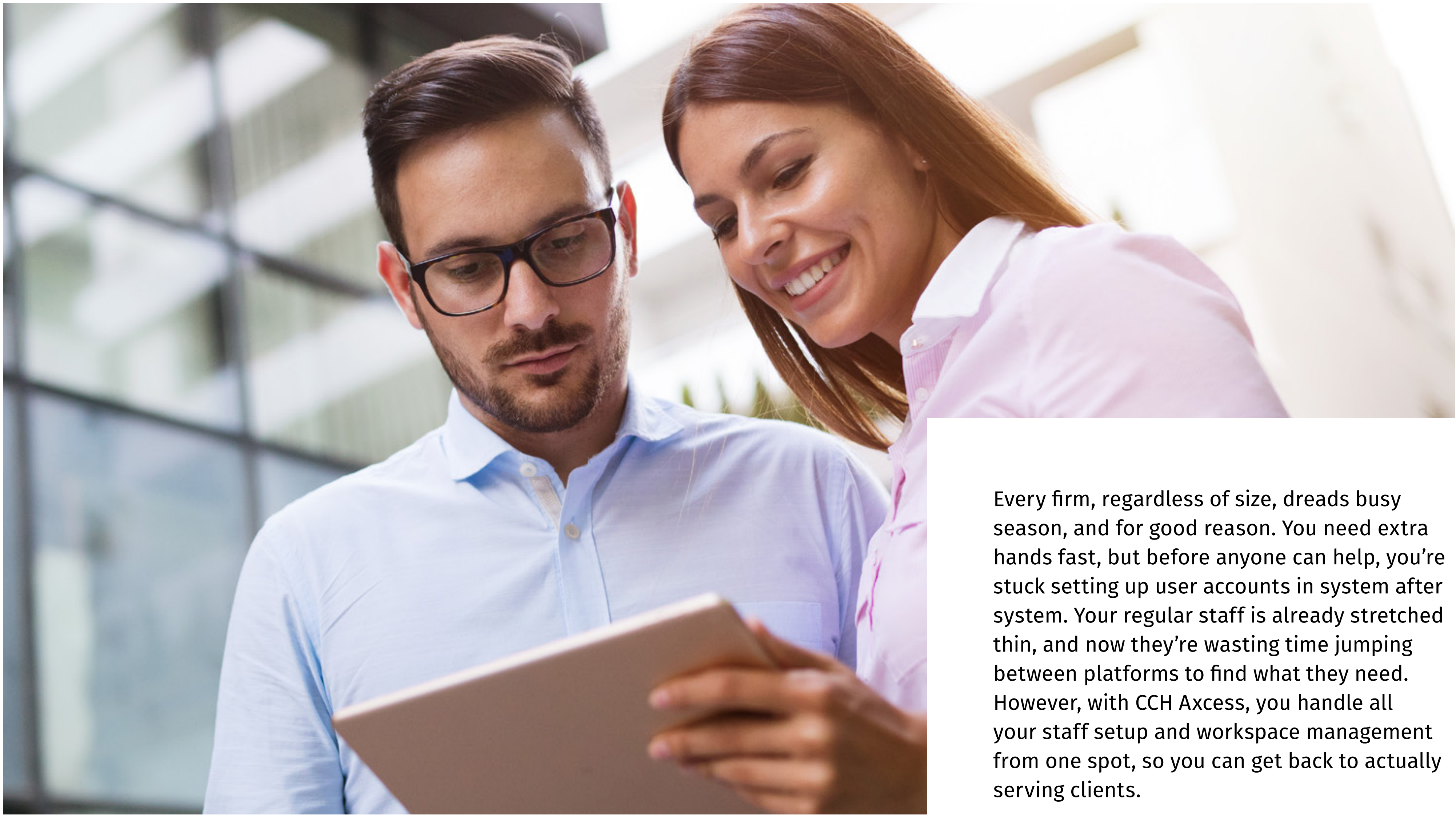
Configurable Notifications Keep You Informed

Of course, consistent data only matters if people know when things change. You've probably experienced this firsthand – finding out days later that a client updated their contact information, or discovering that someone reassigned your best staff member to a different project. CCH Axcess eliminates these communication gaps by letting you configure smart notifications that keep the right people informed at the right time:

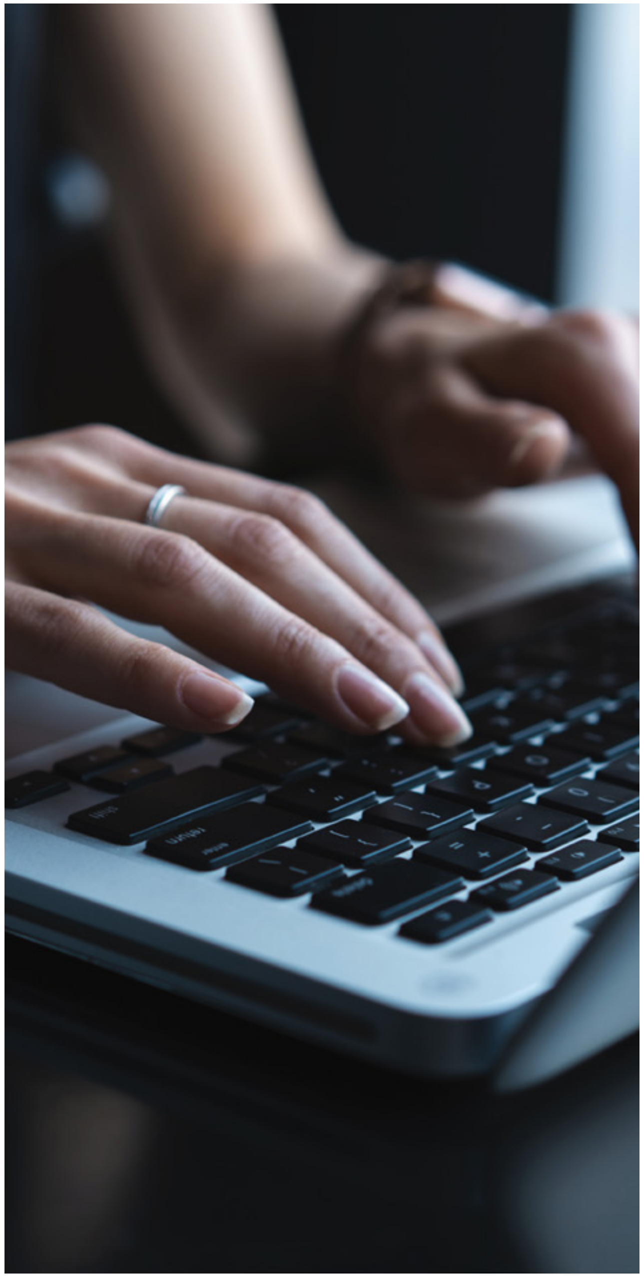
- Setting up client record alerts so partners get immediate notifications when someone updates contact information, engagement status, or billing details.
- Creating staff profile notifications that alert managers when team members change roles, locations, or availability status.
- Configuring project assignment alerts so staff learn instantly when managers reassign them to different clients or engagements.
- Establishing client status notifications that inform service teams when engagement statuses change from "In Progress" to "Review" or "Complete."
- Building custom alerts for high-value clients so partners stay informed about any changes to their most important relationships.

Instead of relying on email chains where critical updates get buried, CCH Axcess delivers targeted alerts that reach the people who need to know. Your partners stay connected to their key clients, your managers track staff changes without playing phone tag, and your team members know about scheduling changes before they impact their work. And if you prefer to receive email notifications instead of or in addition to dashboard notifications, you can set that up as well.

Simplify Staff Management, Improve Daily Productivity



Every firm, regardless of size, dreads busy season, and for good reason. You need extra hands fast, but before anyone can help, you're stuck setting up user accounts in system after system. Your regular staff is already stretched thin, and now they're wasting time jumping between platforms to find what they need. However, with CCH Axcess, you handle all your staff setup and workspace management from one spot, so you can get back to actually serving clients.



One System for Your Staff Management Needs

CCH Axcess eliminates the staff management juggling act by putting everything in one place. Instead of setting up accounts across multiple systems and tracking who has access to what, you handle it all through a single Staff Manager. One person, one login, access to everything they need across tax prep, documents, workflow, or other modules your firm uses.

Such a unified approach turns your biggest staffing challenges into simple tasks:

- When you need three seasonal preparers for tax season, you use the “Seasonal” staff manager template, so the new hires are instantly assigned the correct organizational and reporting information with appropriate security clearances.
- Your office manager sets up security groups once with the proper access levels, and every new person inherits those permissions automatically when they join a group.
- Whether someone gets promoted, changes departments, or leaves the firm, updating their access takes minutes instead of hours across multiple systems.
- Granular functional security settings, client access groups and staff access groups ensure you never have to worry about someone having too much or too little access.

Personalized Workspaces

Your tax preparers don't work the same way your audit managers do, so why should they stare at the same dashboard all day? CCH Axcess lets every person on your team build their workspace around how they work. Each staff member picks what they want to see front and center, from their assigned clients to their deadlines to quick-access tools:

- A tax preparer configures their dashboard to show assigned returns and diagnostic alerts, while a manager sets up panels for team workloads and project deadlines.
- Common actions like opening client files, starting new engagements, or logging billable time happen directly from the main screen with one click.
- Everyone arranges their dashboard panels to match their daily routine, whether that means prioritizing due dates, client communications, or advisory tools.
- Less time navigating through software means more time serving clients and generating revenue.

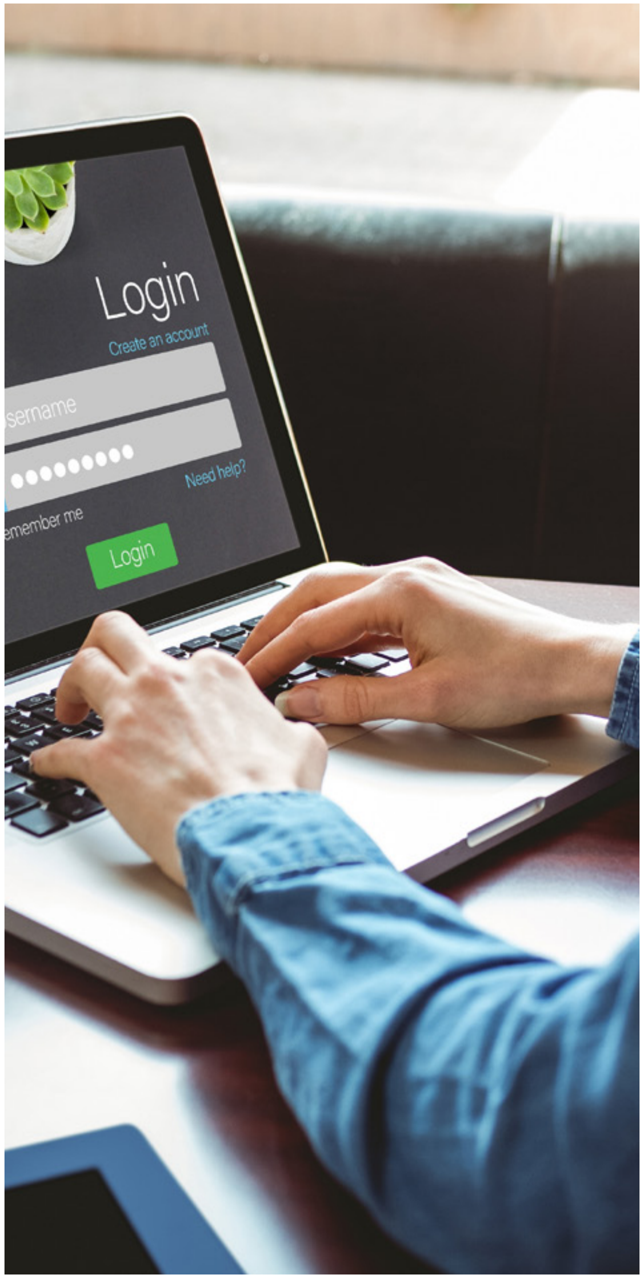
The difference becomes obvious the moment team members log in each morning. Instead of clicking through multiple menus to find their assigned work, everything relevant appears right on the main screen. Those saved minutes might seem small, but they compound quickly across an entire team, especially when deadlines are tight and everyone needs to work at peak efficiency.

Seasonal hires jump into productive work faster because their dashboards guide them to the right tasks from day one. Experienced team members spend their expertise on client work instead of hunting through software interfaces. Everyone benefits.

Reduce Technology Maintenance Overhead

Right now, chances are you're managing logins for tax software, separate credentials for audit tools, different update schedules for practice management — and somehow keeping it all secure. Every application wants its own attention, its own maintenance window, its own troubleshooting session when things go sideways.

Your IT setup shouldn't feel like a part-time job, and that's where CCH Axcess can help. You get one integrated system so you don't have to worry about configuring integration points.



Centralized Login and Authentication Controls

Have you ever been locked out of your software right before a deadline or at a critical time? CCH Axcess solves password frustrations with one unified account system that covers every module. Instead of managing separate credentials across multiple applications, your team uses one login for everything. Here's what happens behind the scenes to make this possible:

- Administrators create user accounts once in a single directory that spans all CCH Axcess modules.
- The system applies firm-wide password policies automatically across Tax, Practice and other modules.
- Multi-factor authentication requires users to enter a mobile code after their password for additional security.
- Single Sign-On integration connects with your existing Active Directory or corporate identity systems.
- Permission changes made in one central location instantly affect access across all applications.

What could this tangibly mean for your day-to-day operations?

- Firm-wide and customizable password rules instantly apply to every CCH Axcess module without additional configuration, reducing the risk of unauthorized access.
- Multi-factor authentication protects your system even if passwords get compromised in data breaches.
- Security policies take effect immediately across all applications instead of requiring separate implementation.

Larger firms can plug into existing Active Directory systems so new hires automatically get the right access levels. Smaller firms get enterprise-level security without the complexity. Either way, your staff focuses on client work instead of password recovery emails, and IT maintenance becomes manageable again.

Install and Update Manager Automation

Once you've streamlined access, the next task is keeping everything current.

Updates once meant blocking out half a Saturday to patch everything individually, hoping nothing breaks in the process. However, when you work with CCH Axcess, you get the benefits of centralized update management that perfectly syncs all your components and simplifies what used to be a complex process:

- The Install and Update Manager handles updates for all CCH Axcess components through one interface.
- Administrators can schedule automatic updates to run overnight or trigger them manually when convenient.
- The system coordinates all module versions so Tax, Knowledge Coach, and other modules all remain compatible.
- Updates download and install in sequence, maintaining data connections between all applications.
- The guided installer walks users through any manual steps without requiring technical expertise.

If you're a growing firm, this becomes especially valuable. You're not burning weekend time on maintenance, and you're not waiting for your IT person to coordinate updates across multiple systems. The software maintains itself while your team focuses on what generates revenue.

Open Integration and API Expansion

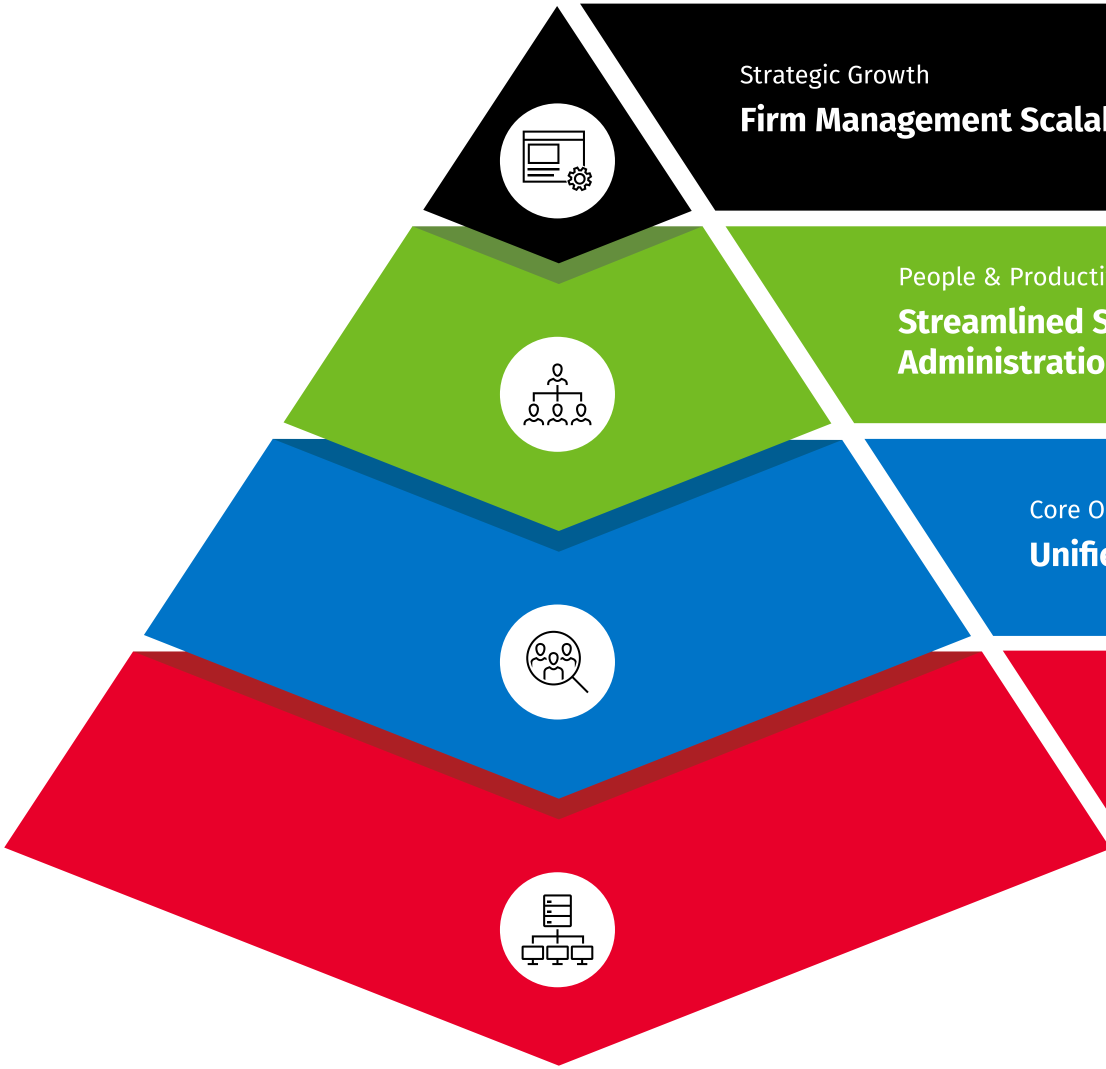
With security and updates handled, you can focus on making your technology work smarter. Those APIs everyone talks about actually solve real problems by connecting your existing tools and automating routine tasks.

The integration capabilities work at several levels:

- The Open Integration Platform provides APIs that can connect CCH Axcess data with external CRMs, ERPs, and industry tools.
- Custom applications and utilities can be built on top of Axcess APIs to handle unique workflow requirements.
- Third-party integrations from the CCH Marketplace extend functionality without custom development.

CCH Axcess APIs enable accounting firms and third-party software vendors to create integrations and automation that connect with CCH Axcess data. You can stop hunting through different systems trying to figure out which one has the current information. Those weekend software update sessions become someone else's problem because the system handles it. And security gets less complicated since everything runs through one place instead of five.

Infographic: The Power of an Integrated Platform



Strategic Growth

Firm Management Scalability

- Flexible organizational structure
- Consistent categories across teams
- Clear performance insights

People & Productivity

Streamlined Staff Administration

- Centralized staff manager
- Predefined security groups
- Personalized dashboards boost productivity

Core Operations

Unified Client Data

- 360-degree client visibility
- Less duplicate data entry
- Fewer admin hours

Technology Foundation

Low-Maintenance Tech Infrastructure

- Simple installation and updates
- Consistent, centralized security settings
- Open integration

Stop Struggling with Your Technology

Your firm doesn't need to stay stuck in digital purgatory. Every hour your team spends on duplicate data entry, every client call that requires checking three different systems, every weekend spent on software updates—that's all fixable.

The firms already using integrated platforms aren't superhuman. They just stopped accepting that technology has to be complicated. They're reclaiming thousands of hours, delivering better client service, and focusing on what genuinely grows their practice.

See it in action: **Watch a live demo** to see how CCH Axcess works in real accounting firm scenarios.

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