

SmartVault vs. CCH Axcess Documents®

CCH Axcess Documents is part of a larger suite, which comes with complexity, absurd price hikes, and "slow AF"—reviewer's words, not ours—processing.

The Hidden Costs of Using CCH Axcess Documents

X Time and Training Burden:

Complex system requiring extensive training and setup, leading to lost productivity and higher costs.

X Unnecessary Features:

Part of a larger, more expensive suite that may include features you don't need, forcing you to pay for unnecessary functionality.

X Growth-Limiting Pricing Structure:

Tiered, complicated pricing based on client numbers can stifle your firm's growth potential, forcing difficult decisions as you scale.

The Advantages of Using SmartVault

✓ Unlimited Scalability:

Unlimited cloud storage and client capacity allow your practice to scale effortlessly as you take on new business.

✓ Comprehensive Feature Set:

Included custom-branded client portal, 24/7 mobile access, robust integrations, and powerful tools create a seamless, collaborative experience for your team and clients.

✓ Proven Track Record:

15+ years of accounting focus, over 3 million users, and SOC 2 Type 2 Compliance prove we deliver reliable, modern software that meets your needs while supporting compliance.



SmartVault offers a more focused, efficient, and reliable solution for modern accounting firms.

15 years+ 3 Million+ 500 Million+ in Business Global Users Docs Stored

Streamline Your Endto-End Tax Preparation Workflow



Add Unlimited Clients

Say goodbye to duplicate data entry and account configuration. SmartVault auto-creates client profiles, security permissions, users, and folder structures.



Engage and Onboard

Create any document, form, quote, and request list. Clients can review, submit source docs, and eSign from anywhere, on any device. All documents are automatically saved to the correct folder.



Auto-Route Returns

Print and auto-route tax returns directly into the correct SmartVault client folder by tax year. This automation saves you time, eliminates human error, and makes managing large volumes of returns easier.

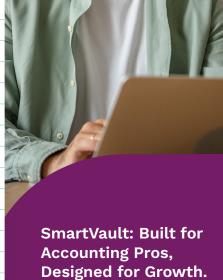


Accelerate Reviews

Send clients their returns through the portal, enabling them to review, approve, and eSign (with knowledge-based authentication) 100% online. Monitor the status of tax returns, organizers, and client interactions through an intuitive dashboard.

SmartVault vs. CCH Axcess Documents®

	SmartVault	ССН
Client Engagement and Onboarding		
Custom, Digital Client Intake Form	✓	✓
Engagement Letters with eSignature	✓	×
Ability to Bulk Send Engagement Letters	✓	×
Pricing Engine	✓	X
Customizable Proposal Templates	✓	X
Automated Folder Structure Creation	✓	~
Custom List to Request Source Documents	✓	✓
Source Docs Automatically Route to Correct Folder	✓	~
Robust Dashboard to View Status and Send Reminders	✓	✓
Automatic Notifications Keep Everyone Updated	✓	✓
Document Management		
Unlimited Storage	✓	×
Cloud-Based 24/7 Access	✓	✓
Customizable Folder Structures	✓	✓
Ability to link (group) multiple clients	✓	×
Docs Available Online and on Desktop	✓	✓
PDF to Print Functionality	✓	~
Auto-Routing/Saving	✓	✓
Document Locking	✓	~
Version Control & Document History	✓	✓
Advanced Search Functionality	✓	✓
OCR for Scanned Documents	✓	✓
Document Data Extraction	✓	✓
Integration with Multiple Tax Prep Systems	✓	×
Seasonal Worker Licenses	✓	X
Client Portal		
Included Custom Client Portal	✓	×
Unlimited Clients	~	✓
Real-Time Staff Collaboration	✓	X
Integrated eSignature Workflow with Auto-Routing	~	X
Integrated Payment Collection	✓	X
Send Password-Protected Files Via Email	✓	X
Security and Compliance		
SOC 2 Compliant	~	~
FINRA, SEC, GLBA Compliant	✓	~
Audits Logs and Activity Tracking	~	✓
Platform Reliability		
Specialized for Accounting	✓	✓
Mobile Access	~	✓
~100% Uptime	✓	X



Visit SmartVault.com

Schedule a demo:

