

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

- ✗ Time and Training Burden:**
Complex system requiring extensive training and setup, leading to lost productivity and higher costs.
- ✗ Unnecessary Features:**
Part of a larger, more expensive suite that may include features you don’t need, forcing you to pay for unnecessary functionality.
- ✗ 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+
in Business


3 Million+
Global Users


500 Million+
Docs Stored

Streamline Your End-to-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 Access Documents®

	SmartVault	CCH
Client Engagement and Onboarding		
Custom, Digital Client Intake Form	✓	✓
Engagement Letters with eSignature	✓	✗
Ability to Bulk Send Engagement Letters	✓	✗
Pricing Engine	✓	✗
Customizable Proposal Templates	✓	✗
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	✓	✗
Client Portal		
Included Custom Client Portal	✓	✗
Unlimited Clients	✓	✓
Real-Time Staff Collaboration	✓	✗
Integrated eSignature Workflow with Auto-Routing	✓	✗
Integrated Payment Collection	✓	✗
Send Password-Protected Files Via Email	✓	✗
Security and Compliance		
SOC 2 Compliant	✓	✓
FINRA, SEC, GLBA Compliant	✓	✓
Audits Logs and Activity Tracking	✓	✓
Platform Reliability		
Specialized for Accounting	✓	✓
Mobile Access	✓	✓
~100% Uptime	✓	✗



SmartVault: Built for Accounting Pros, Designed for Growth. Schedule a demo:

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