

CCH Client Axxcess™ Portal User Guide



PRESTI & NAEGELE

ACCOUNTING OFFICES ACCOUNTING TECHNOLOGY CONSULTANTS

Icon Legend



Tips Best practice tips and shortcuts



Notes Informational notes about functions



Warning Important warnings about a function

CCH Client Access

<https://www.clientaccess.com>

CCH Client Access allows you to receive and share files with Presti & Naegele from any web browser or operating system.



It is important to note that based on Presti & Naegele's portal configurations, you may not have access to every feature covered in this guide.



CCH Client Access can be accessed via the web URL (see above), or by downloading the free mobile app. Search "CCH Client Access" in the Apple® App Store or the Google® Play Store.

Logging in to Client Access

Login using the URL listed above or via the mobile app. Refer to your welcome email for the temporary password needed for your initial login to Client Access.

Wolters Kluwer
CCH

Welcome to your portal!

Login ID
youremail@email.com

Password

Save Login

Log In

[I Forgot My Password](#)

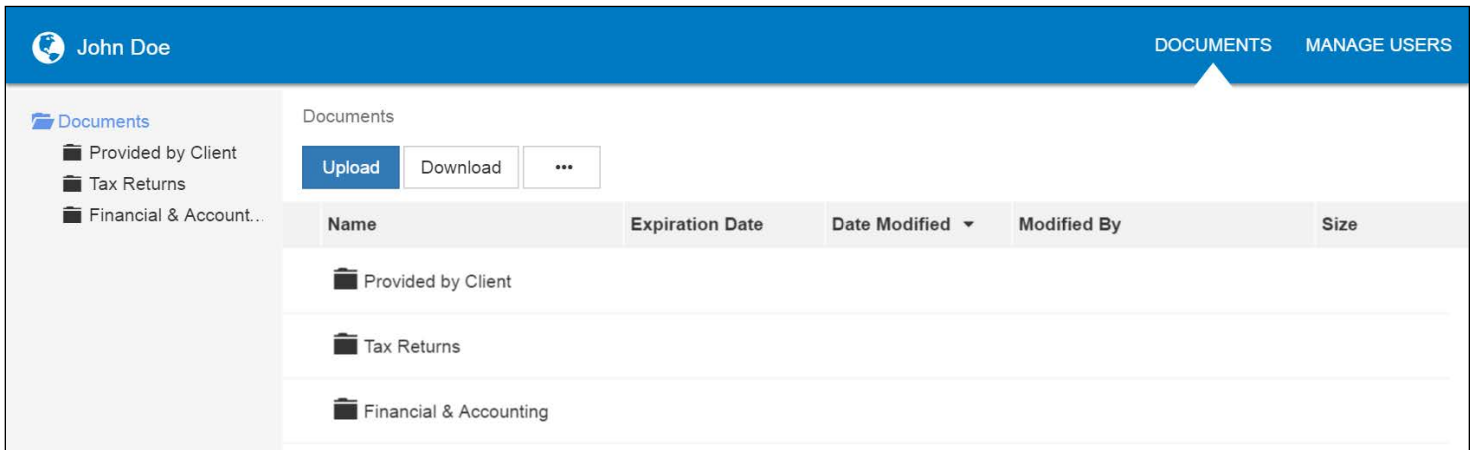
Login



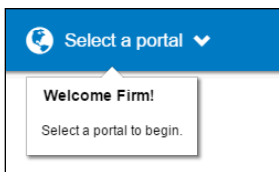
Login Tips

- The Login ID (email address) is not case sensitive; the temporary password is.
- You will be required to change your password upon logging in for the first time and answer security questions. Your security questions can help you access your portal if you ever forget your password.
- Your new password may be from 8 to 32 characters in length, must contain at least one alpha character, one numeric character, and one special character (e.g. !, @, #, etc.). The password is case sensitive.
- Your password may be reset at any time by clicking "**I Forgot My Password?**".
- If prompted, review and agree to the Presti & Naegele end user license agreement. You can also download a copy.

Downloading files from Client Access



Client Access Home Page



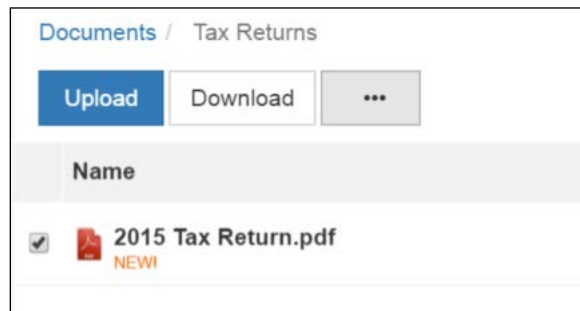
Select a portal



If you have access to more than one Portal, click **Select a Portal** at the top, left-hand portion of the page, and then select or search for a portal by name.



After logging in to Client Access, you will see a list of folders used to organize your files. **Click on a folder to display its files.**



Download Files

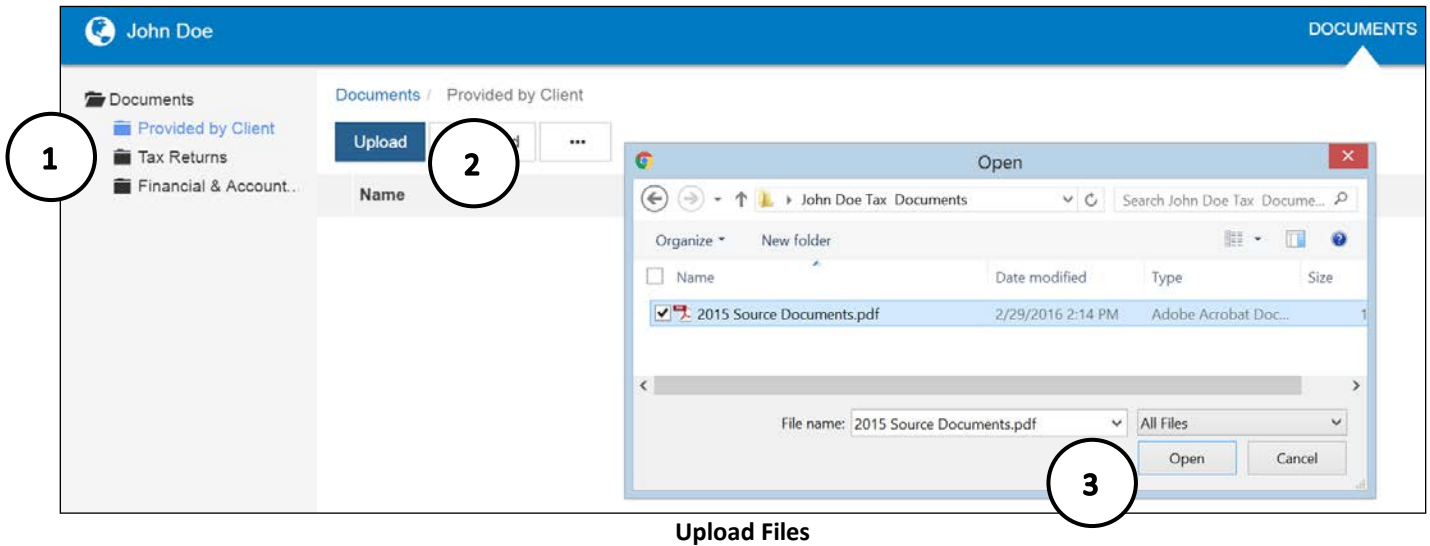


To download a file, simply click the file name or check the box and click **Download**, either option will launch your browser's file download prompt allowing you to open or save the file. You can download one or multiple files at a time.



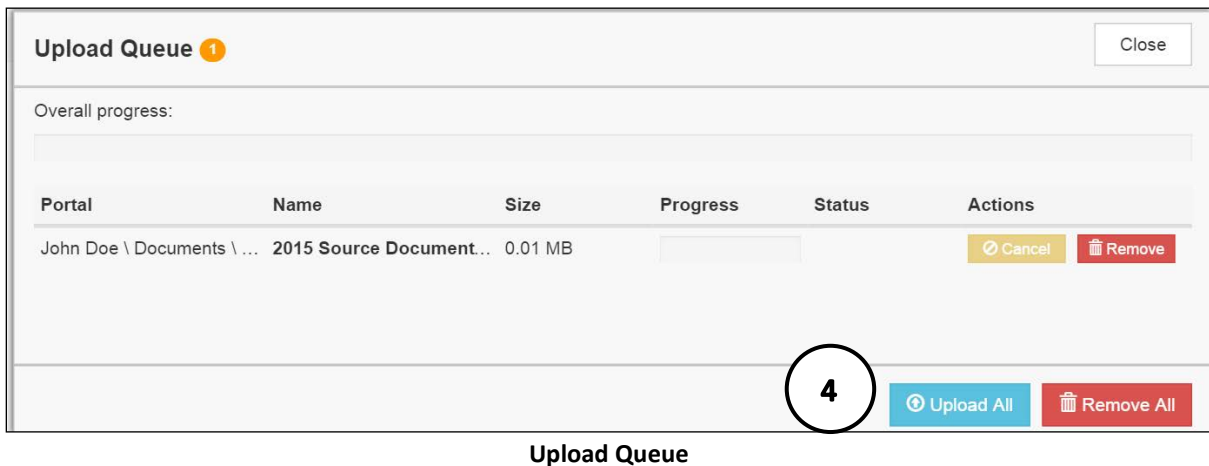
To download files, it may be necessary to disable your pop up blocker in Google® Chrome®, or other web-browsers.

Uploading files to Client Access



Follow the steps to add a file to you Client Access portal:

1. Click the destination folder (where the file will be located)
2. Click **Upload**, browse to and select the file(s) you wish to upload
3. Click **Open**



4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Access. An email notification is sent to Presti & Naegele.




You will see an on-screen confirmation that your file(s) were successfully added to Client Access. Return to your Documents or simply close your browser window to exit Client Access.



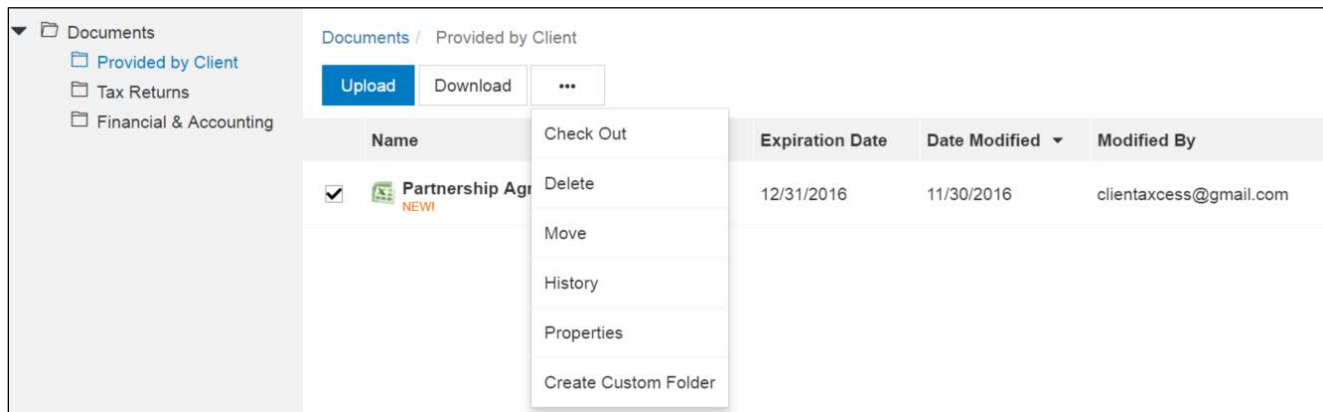
You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to Client Access.



Click the  icon at the top, right-hand corner of the page to reactivate the Upload Queue if you accidentally minimize it prior to selecting Upload All.

Working with Files in Client Access

Deleting Files



Delete Files



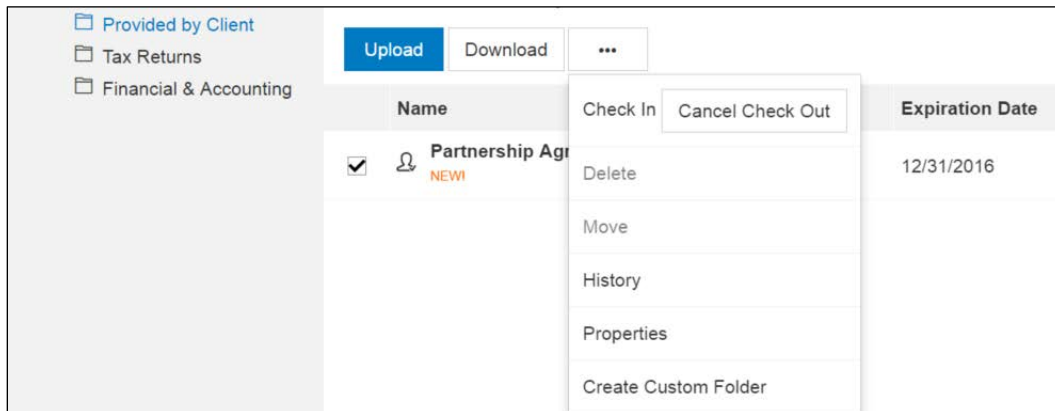
You can **not** delete files uploaded by Presti & Naegele or other Portal users. You can delete files that you upload. Click the box to the left of the file name, click the **More Options** button, and then choose **Delete**. You will be prompted for confirmation, click **Yes** to remove the file from Client Access.



If you would like to have a file added by Presti & Naegele or another portal user removed from Client Access, follow the steps above, but choose the option "**Request for Deletion**", which will be displayed instead of the Delete, and will email to Presti & Naegele notifying us that you want the file to be deleted.

Checking Out Files

Collaborate with Presti & Naegle by using the Check Out feature to download a file, make changes, and then add the modified file back to Client Access. The file will be overwritten to reflect your changes upon Check In.



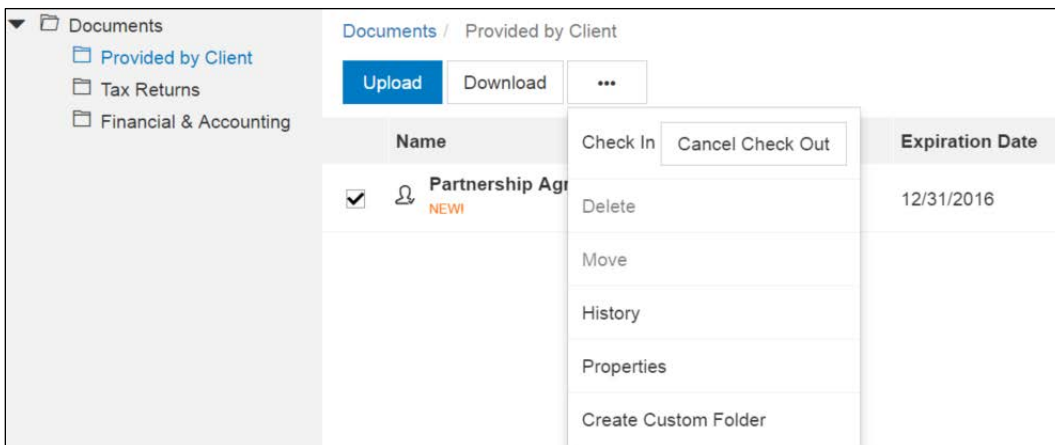
Check out a file



Steps to Check Out a file

1. Check the box to the left of the file name, and then click the **More Options** button
2. Select **Check Out**
3. On the **Check-out** prompt, click the **Due date to check in** field, and choose the latest date you expect to Check In the file, then click **Check Out**
4. When prompted by your web browser, save the file to your computer or network
5. Launch the file and make any desired changes, then click **Save** and close

Checking in Files



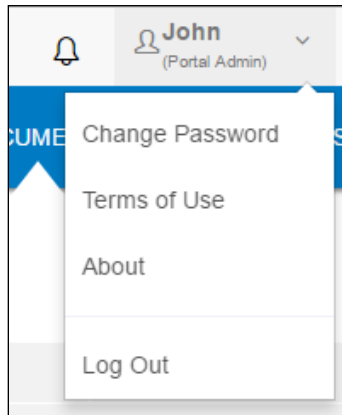
Check in a file



Steps to Check In a file

1. Log in to Client Access, browse to the folder where the checked out file is located
2. Check the box to the left of the file name
3. Click the **More Options** button, and select **Check In**
4. When prompted, click Browse and navigate to the checked out file on your computer.
5. Click **Check In**
6. You will receive confirmation the file has been checked in successfully

Changing Passwords and Logging Out



User Options



At the top right-hand portion of the page, click the arrow to view your user options. From this menu you can change your password or Log out of Client Access.