Schofer Dillberg & COMPANY, INC.
CERTIFIED PUBLIC ACCOUNTANTS & BUSINESS ADVISORS

CCH Client Axcess™ Portal User Guide

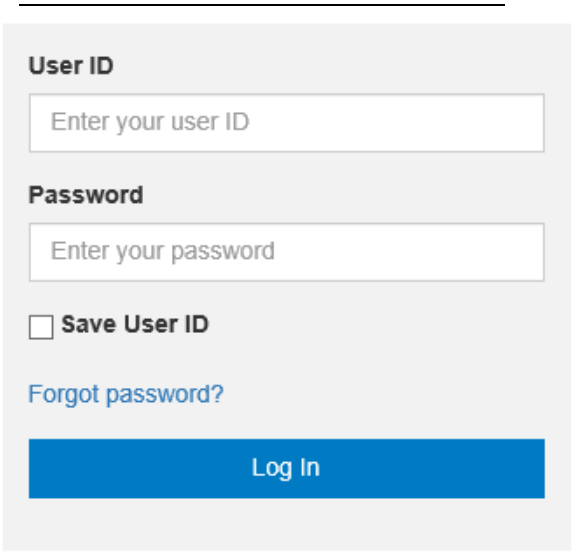
For Use With Internet Explorer Web Browsers

Icon Legend		
	Keys	Quick reference to the key aspects of a particular function
	Tip	Best practice tips and shortcuts
	Notes	Informational notes about functions
	Warning	Important warnings about a function

Quick Start Guide

Portal Login

Launch your internet browser and browse to https://portal.cchaxcess.com/portal

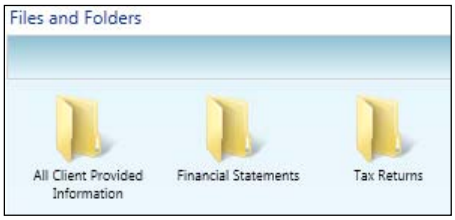


Portal Login

Login Tips

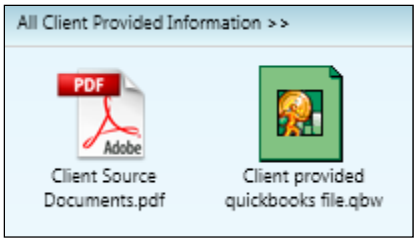
- Refer to the emails received from SDC for login information.
- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive.
- You will be required to change your password upon logging in for the first time and answer at least one security question. 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 anytime by clicking "Forgot your password?"

Download files from Portal



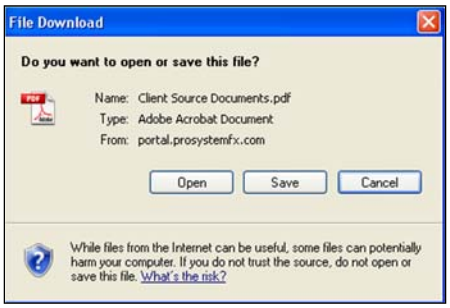
Files and Folders

Folders are used to organize files on the portal. Simply double-click on a folder to view your files.



Portal Documents

A simple way to view or save a file is to double-click on the file name. Double-clicking on a file will display the file download screen, displayed below.

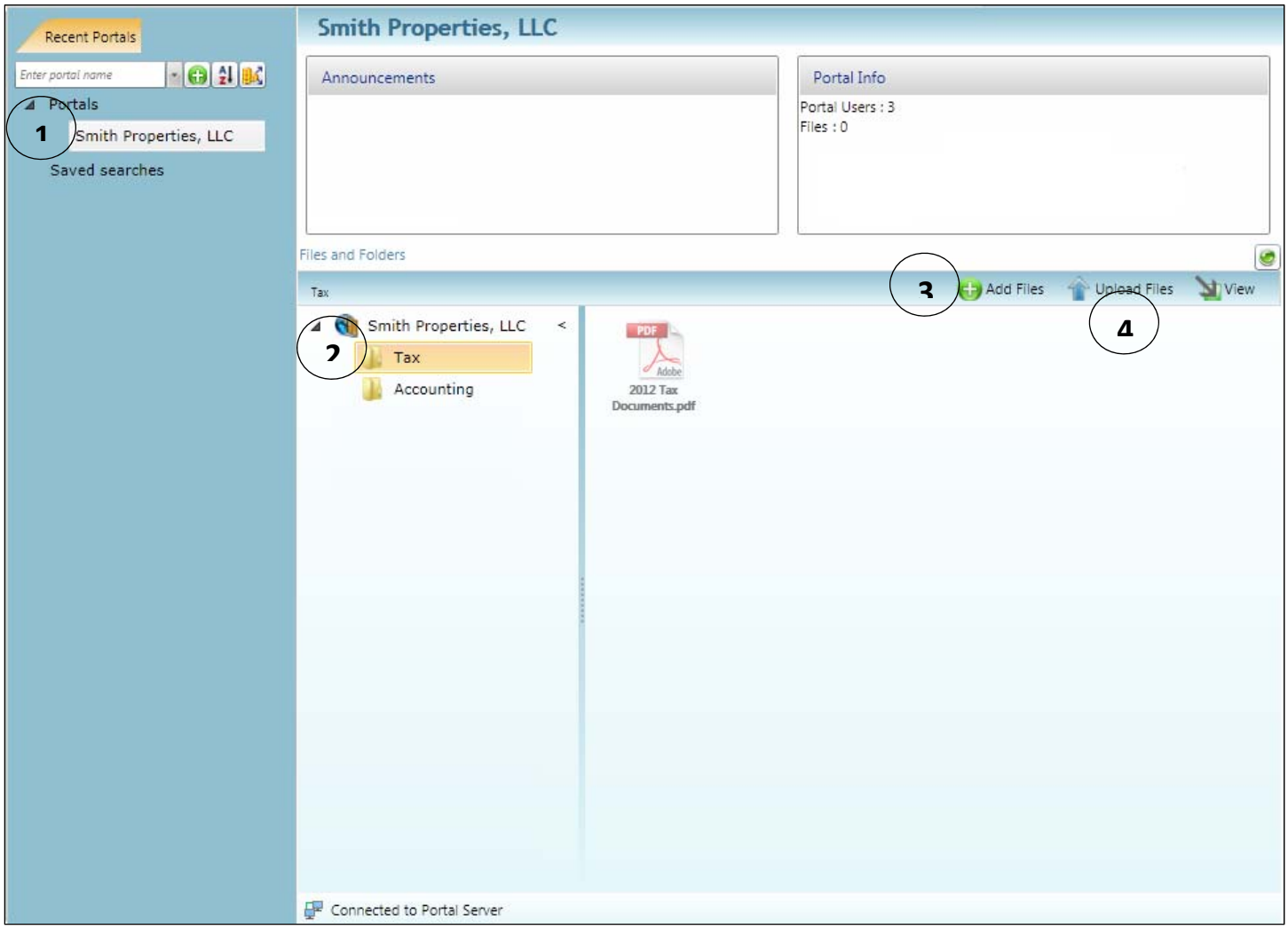


File Download

Click open to view the file or save to download\save a copy to your computer or network. When a file is downloaded a copy is created and does not affect the file on your portal.

It is recommended to download/save a copy of your deliverable items from Portal as most files will not remain there indefinitely. SDC can provide more detail regarding how long files will be accessible via Portal.

Add Files to Portal



Add Files

Steps to Add Files to Portal

On the Portal Home page:

1. Select a portal (only for those users that have access to multiple portals)
2. Select the file location (folder)
3. Click Add Files to select file(s) via Windows Explorer or Drag and Drop files from your computer to the Files and Folders section
4. Click Upload Files to upload the file(s) to Portal