

Client Axcess™ ortal User Guide



Logging in to Client Axcess Portal

Refer to your welcome email for the temporary password needed for your initial login to Client Axcess.

Swolters Kluwer	
Welcome to your portal!	
Login ID	
youremail@email.com	
Password	
≥ Save Login	
Logies	
I Forgot My Password	
I Forgot My Password	

Login

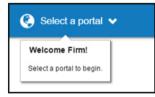
Login Tips

- 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 "Forgot password?".
- If prompted, review and agree to the [firm name] end user license agreement. You can also download a copy.

Downloading files from Client Axcess

🌏 John Doe					DOCUMENTS	MANAGE USERS
Documents Provided by Client Tax Returns Financial & Account	Documents Upload Download ····					
	Name	Expiration Date	Date Modified 🔻	Modified By		Size
	Provided by Client					
	Tax Returns					
	Financial & Accounting					

Client Axcess Home Page



If you have access to more than one Portal, click Select a Portal at the top, left-hand portion of the page.



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

Documents / Tax Returns						
	Upload	Download •••				
	Name					
2015 Tax Return.pdf NEWI						
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.

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

Uploading files to Client Axcess

🄇 John Doe					DOCU
Documents Provided by Client	Documents / Provided by Client				
🖀 Tax Returns	Upload 2 1 ····	C	Open		×
Financial & Account	Name		~ C	Search John Doe Tax Docu	ne P
		Organize • New folder		III • []	0
		Name	Date modified	Туре	Size
		2015 Source Documents.pdf	2/29/2016 2:14 PN	1 Adobe Acrobat Doc	
		< File name: 2015 Source Docu	ments.pdf	All Files	v cel

Follow the steps to add a file to you Client Axcess 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 Axcess.

Upload Queue <u>(</u>					Close
Overall progress:					
Portal	Name	Size	Progress	Status	Actions
John Doe \ Document	s \ 2015 Source Docum	ent 0.01 MB			Cancel
				\frown	
				4	Upload All 🗂 🛍 Remove All

Upload Queue



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

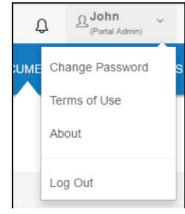
You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to Client Axcess.

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

Changing Passwords and Logging out



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 Axcess



User Options