

OVERVIEW

XCM integration with CCH Practice Management requires an evaluation of a firm's current CCH Practice Management configuration and is eligible to firms that fit a strict set of criteria.

This document will instruct firms on the following integration information:

- The information relevant to the integration
- How to collect and provide this information for a quick evaluation
- Approval or postponement for moving forward

Time capture is used in XCM to provide greater visibility for resource and budget management purposes in the following ways:

- Automated Tax Scheduling – the Resource Allocation Scheduling module takes into account both budgeted and actual hours in determining which staff members are available to take on additional work.
- Budget Management – XCM's Control Sheet displays both the budgeted time for a particular Task or project as well as the actual time accrued for that Task by role at any time during the workflow. This highlights real-time disparities so that they can be addressed before the work is completed.
- Reporting – the budgeted and actual time captured on the detail and firm-customized reports allow firms to compare disparity on an individual client or Task basis, as well as across the entire client base, for client billing, staff training, and future budget planning.

CRITERIA FOR ELIGIBILITY

The Time & Billing enhancement contains a number of factors that must be accounted on the client end for the integration to work effectively. The content of each is covered in subsequent sections.

The high level criteria for integration include:

1. Client must first complete, or have already completed, the initial integration process to connect the client databases. This guide does not cover those requirements.
2. Skill Level: This field must be populated on each employee in CCH Practice Management.
3. Service Code: The service code structure must be established in CCH Practice Management in a manner that allows XCM to map Subcategories to corresponding XCM Task types.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

4. Time Entry: The one custom field made available within CCH Practice Management Time Entry must not be utilized or repurposed in order to allow a period end date to be entered during the time entry process.

An XCM consultant must evaluate your firm against the above criteria to determine eligibility for the Time & Billing integration. For firms that are not immediately eligible for the integration, the XCM consultant will outline the update requirements related to the CCH Practice Management configuration. Each firm must determine the impact of these change requirements and address the level of effort related to those changes internally with firm resources.

The integration will pull released time from PM into the specific Task within XCM at the specific role shown on the XCM routing sheet.

The following table shows the PM mapping field and its corresponding field in XCM.

PM Field		XCM Field
Client Data	➡	Client Data
Service Codes	➡	Task Types
Skill Levels	➡	Roles
XCM Custom Field	➡	TaskPE Date

EVALUATION PROCESS

A firm must provide the following information before scheduling work to an XCM resource:

1. To start the integration process, send an Excel file of your current service code listing and skill level listing to support@xcmsolutions.com.
2. Review the programming needed for use of the PM Time Custom field and provide a screenshot of the programming completed.
3. Include your IT contact, phone and email.

This information will be quickly reviewed by an XCM consulting resource and the firm will be notified of their prioritization on the completion of the initial evaluation.

The evaluation process will begin on receipt of all aspects of the requested information. This evaluation process will take approximately 1-2 weeks and the client can expect a determination at the conclusion of the evaluation process. Assuming all criteria related to the evaluation process are satisfied, the client will be provided with a timeline for the installation and completion of the time integration process.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

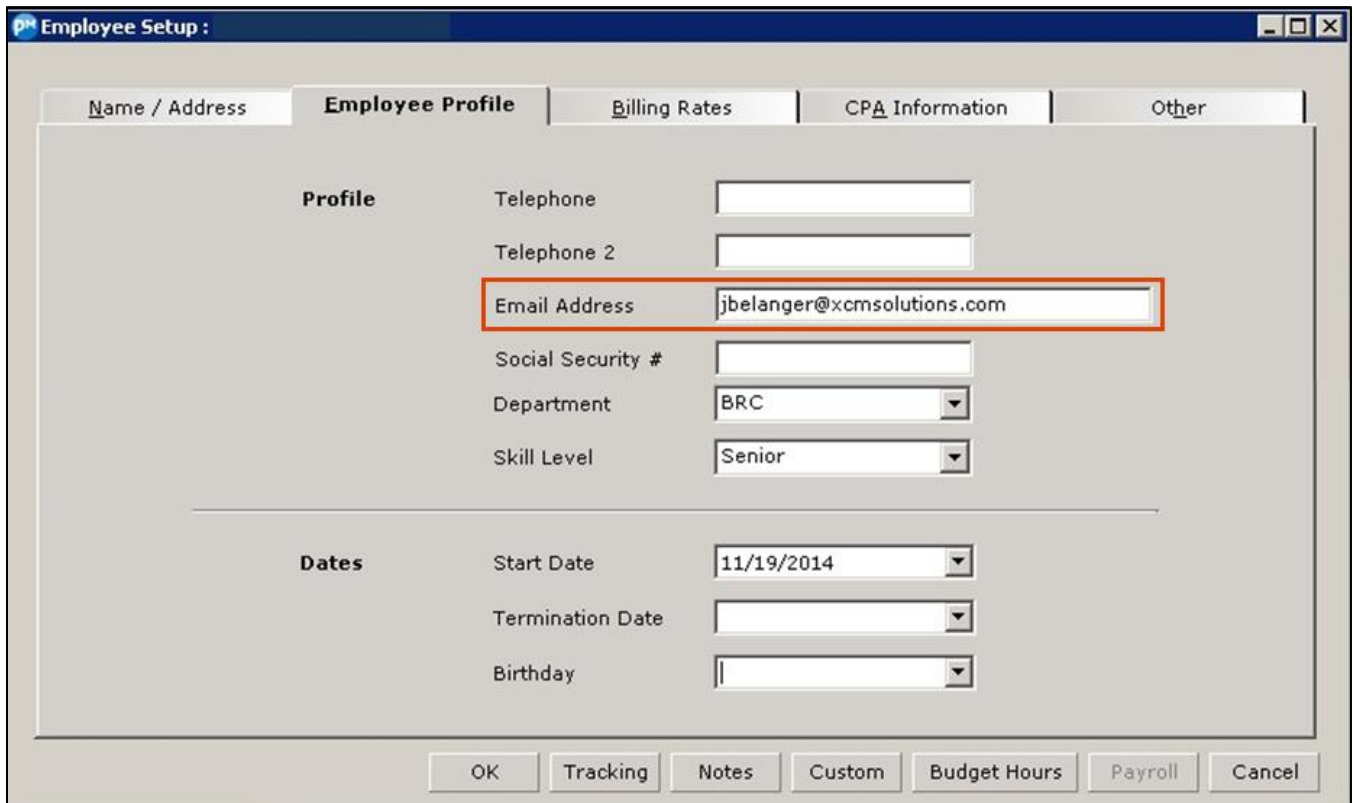
EMPLOYEE PROFILES

For the integration to work correctly, XCM requires employee specific information to be **Populated** and **Mapped correctly between systems**.

The following section describes the information required for the evaluation process.

Email Address

XCM looks up the employee's email address from the PM **Email Address** field while matching staff time entry to the corresponding Tasks, roles, levels, etc. The email address in CCH Practice Management must exactly match the user's login email address in XCM or the user mapping synchronization will not work.



Skill Level

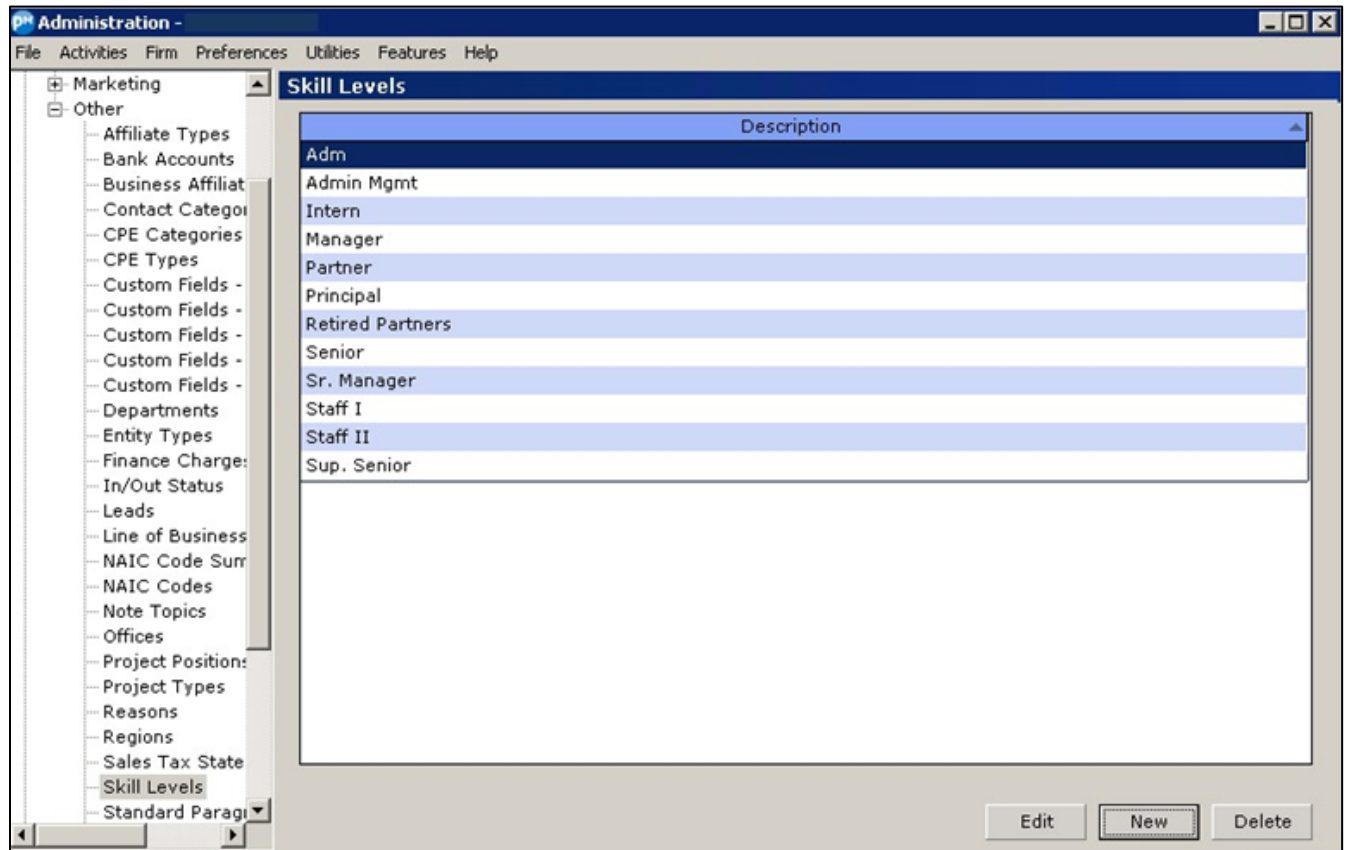
Skill Level allows firms to categorize employees according to professional levels. Each employee must have a skill level assigned to their user profile in CCH Practice Management. This skill level will be used to map the user to the XCM role(s) that user provides on your client engagements. This skill level mapping can be accomplished in a **one to many** relationship.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

Requirement: Firms must provide XCM with a listing of all skill levels currently utilized in their CCH Practice Management application. This information can be found in the following location in PM: **Administration→Lists→Other→Skill Levels**



Firms that do not populate skill levels are not eligible for the integration process until these fields are created, populated within each employee profile, and the list provided to XCM for evaluation.

Populating Skill Levels in CCH Practice Management

The process to create Skill Levels is as follows:

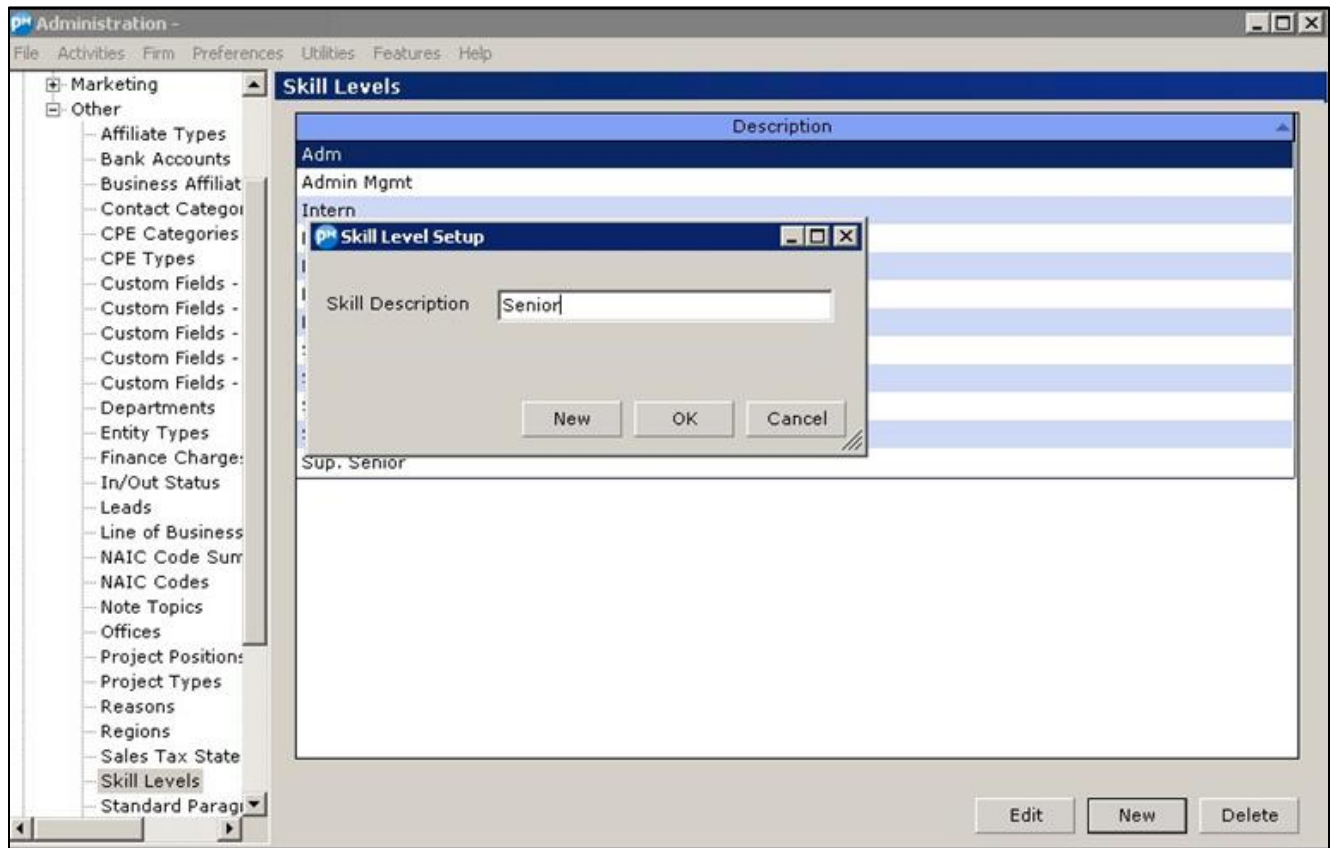
1. Click **New** in the **Administration** screen to open the **Skill Level Setup** screen.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

2. Enter the **Skill Description** and click **OK**.

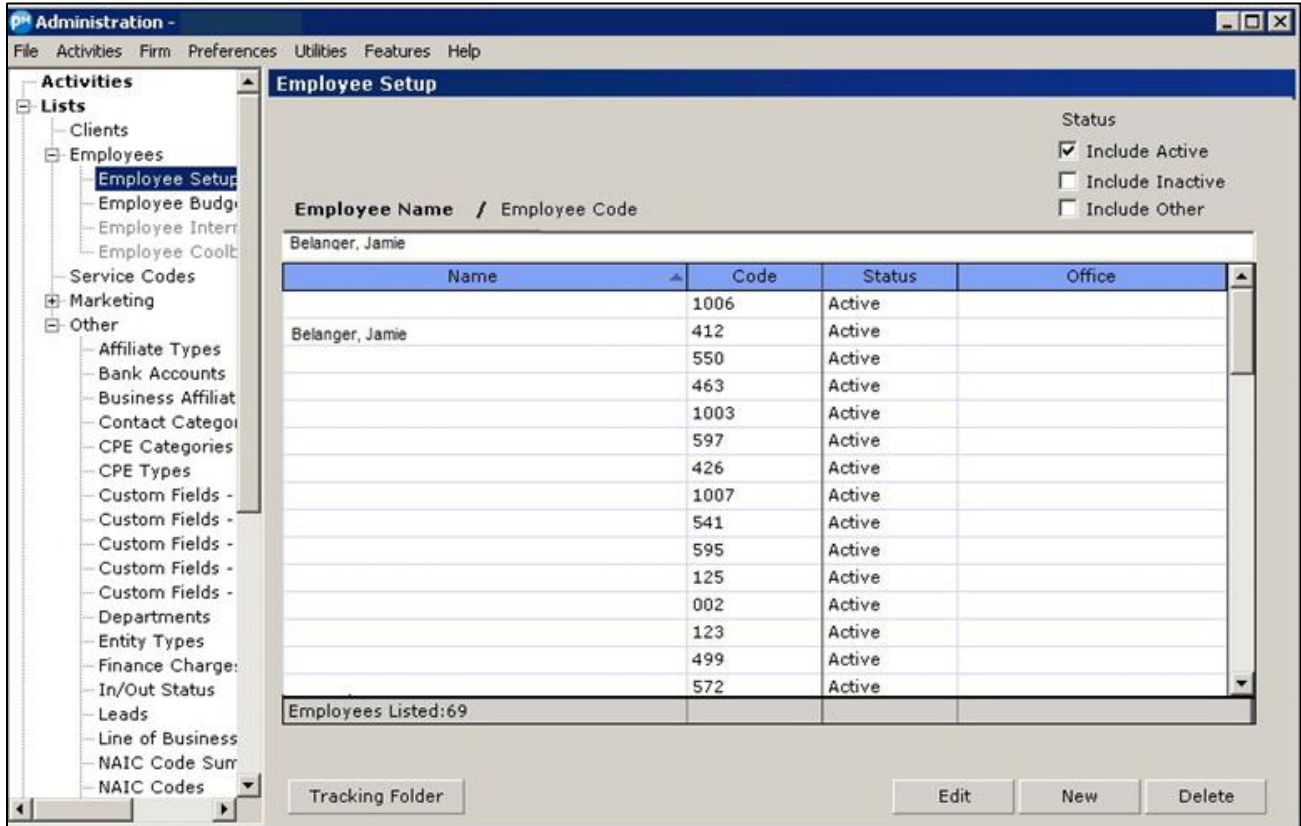


Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

3. Select the Employee Profile. To access the Employees Profile in PM, go to **Administration→ Lists→ Employees→ Employee Setup**



Administration -

File Activities Firm Preferences Utilities Features Help

Activities

- Lists
 - Clients
 - Employees
 - Employee Setup**
 - Employee Budget
 - Employee Interr
 - Employee Coolb
 - Service Codes
 - Marketing
 - Other
 - Affiliate Types
 - Bank Accounts
 - Business Affiliat
 - Contact Categor
 - CPE Categories
 - CPE Types
 - Custom Fields -
 - Custom Fields -
 - Custom Fields -
 - Custom Fields -
 - Custom Fields -
 - Departments
 - Entity Types
 - Finance Charge:
 - In/Out Status
 - Leads
 - Line of Business
 - NAIC Code Sum
 - NAIC Codes

Employee Setup

Status

- ☒ Include Active
- ☐ Include Inactive
- ☐ Include Other

Employee Name / Employee Code

Belanger, Jamie

Name	Code	Status	Office
Belanger, Jamie	1006	Active	
	412	Active	
	550	Active	
	463	Active	
	1003	Active	
	597	Active	
	426	Active	
	1007	Active	
	541	Active	
	595	Active	
	125	Active	
	002	Active	
	123	Active	
	499	Active	
	572	Active	

Employees Listed:69

Tracking Folder

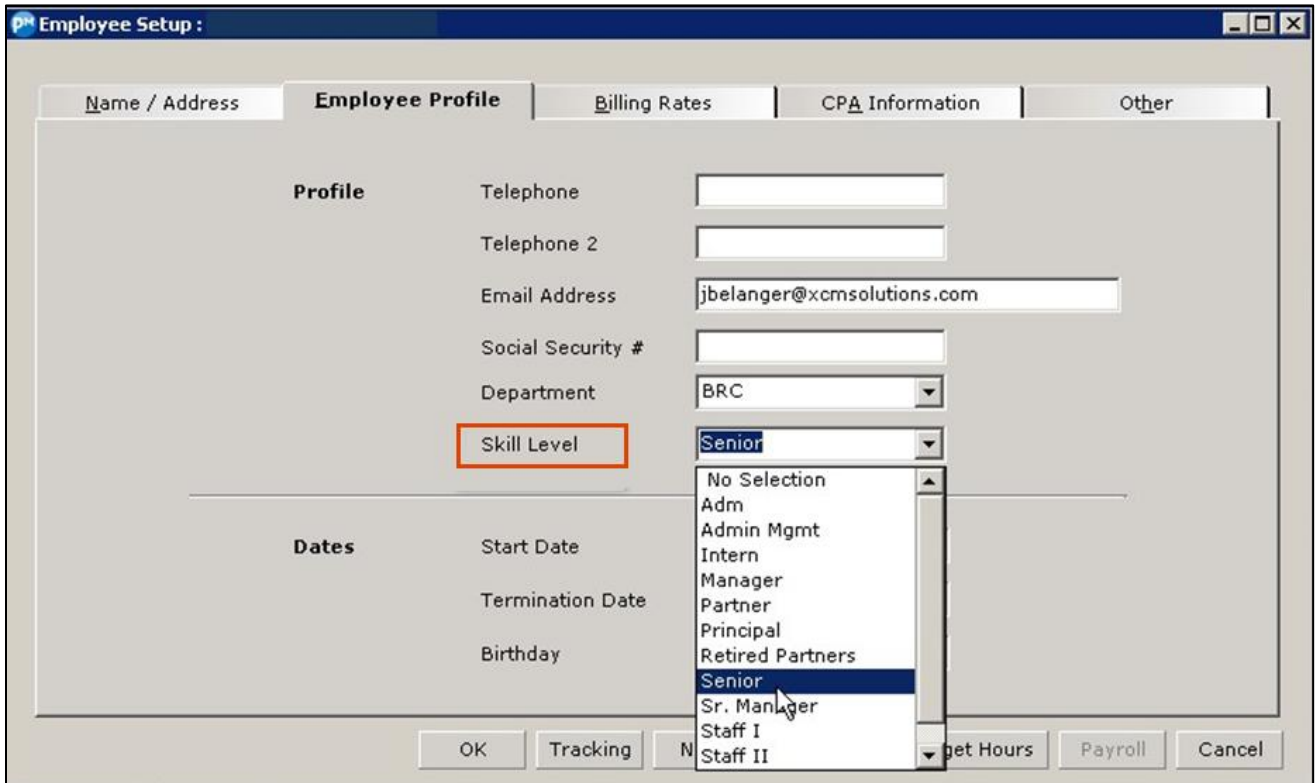
Edit New Delete

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

4. Apply the **Skill Level** to the **Employee Profile**.



The screenshot shows the 'Employee Setup' window with the 'Employee Profile' tab selected. The 'Skill Level' dropdown menu is open, displaying a list of roles. The 'Senior' role is currently selected and highlighted in blue. Other roles visible in the list include No Selection, Adm, Admin Mgmt, Intern, Manager, Partner, Principal, Retired Partners, Sr. Manager, Staff I, and Staff II. The 'Department' is set to 'BRC' and the 'Email Address' is 'jbelanger@xcmsolutions.com'.

SERVICE CODE STRUCTURE

The quality of data and accuracy of the integration process directly relates to the Service Code structure established in CCH Practice Management. The integration specifically looks to the Sub Category level and is used to identify the Service Codes and their related XCM Task Types. Firms that do not have a consistent approach to the architecture of their Service Code structure may not be eligible for the Time & Billing Integration.

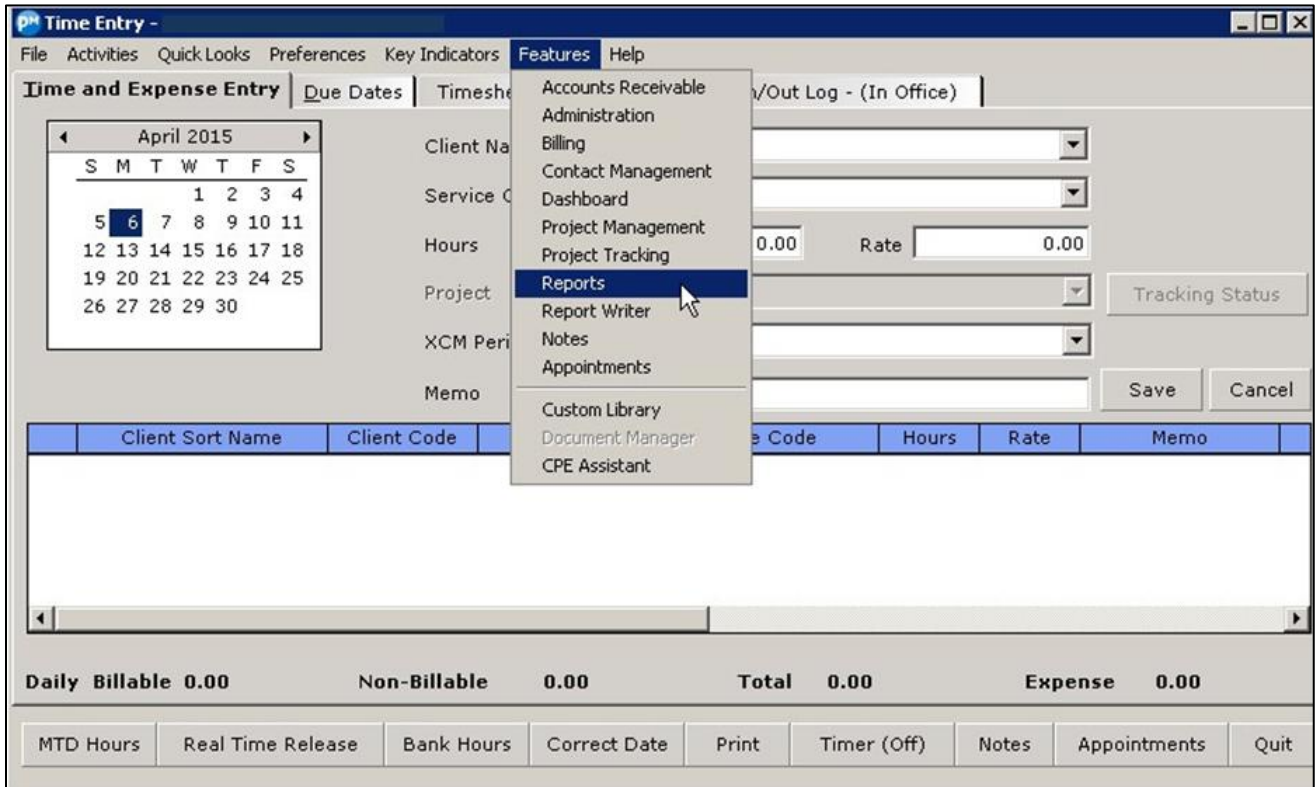
Requirement: Provide XCM with a listing of all Service Codes currently utilized in your CCH Practice Management application. This information can be gathered by using the following reporting option within the CCH Practice Management report suite.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

In PM Time Entry, go to **Features** and choose **Reports** to open the **Reports** screen.



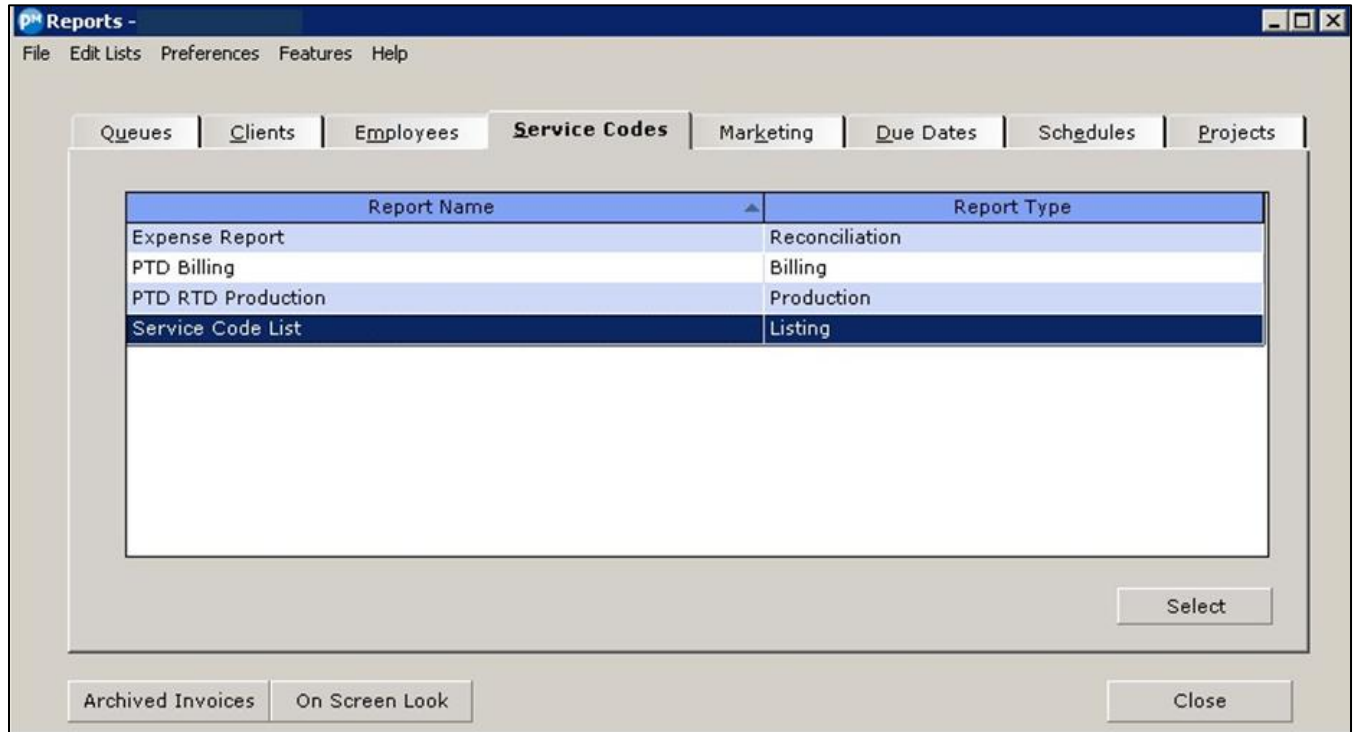
The screenshot shows the 'PM Time Entry - Reports' window. The 'Features' menu is open, and 'Reports' is highlighted. The background form includes a calendar for April 2015, a 'Time and Expense Entry' section with fields for Client Name, Service Code, Hours, Project, XCM Period, and Memo, and a bottom status bar with 'Daily Billable 0.00', 'Non-Billable 0.00', 'Total 0.00', and 'Expense 0.00'.

In the **Reports** screen, choose the **Service Codes** tab to display the different report types available. Select the **Service Code List** report name and click **Select** to open the **Service Code Listing** report screen.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

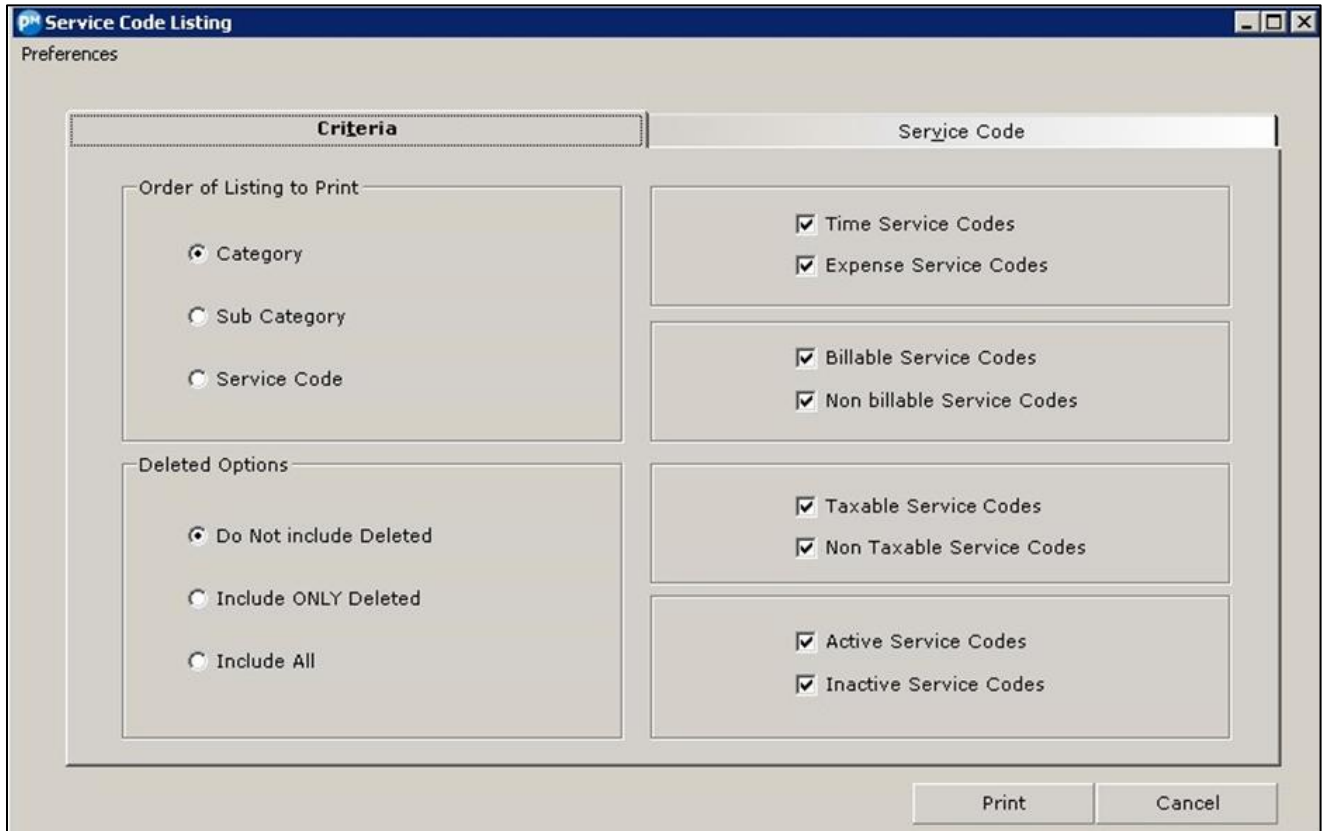


Enter the following criteria and click **Print** .This opens the **Printer/Format Selection-Service Code Listing** dialog box.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021



Service Code Listing
Preferences

Criteria

Order of Listing to Print

- ☒ Category
- ☐ Sub Category
- ☐ Service Code

Deleted Options

- ☒ Do Not include Deleted
- ☐ Include ONLY Deleted
- ☐ Include All

Service Code

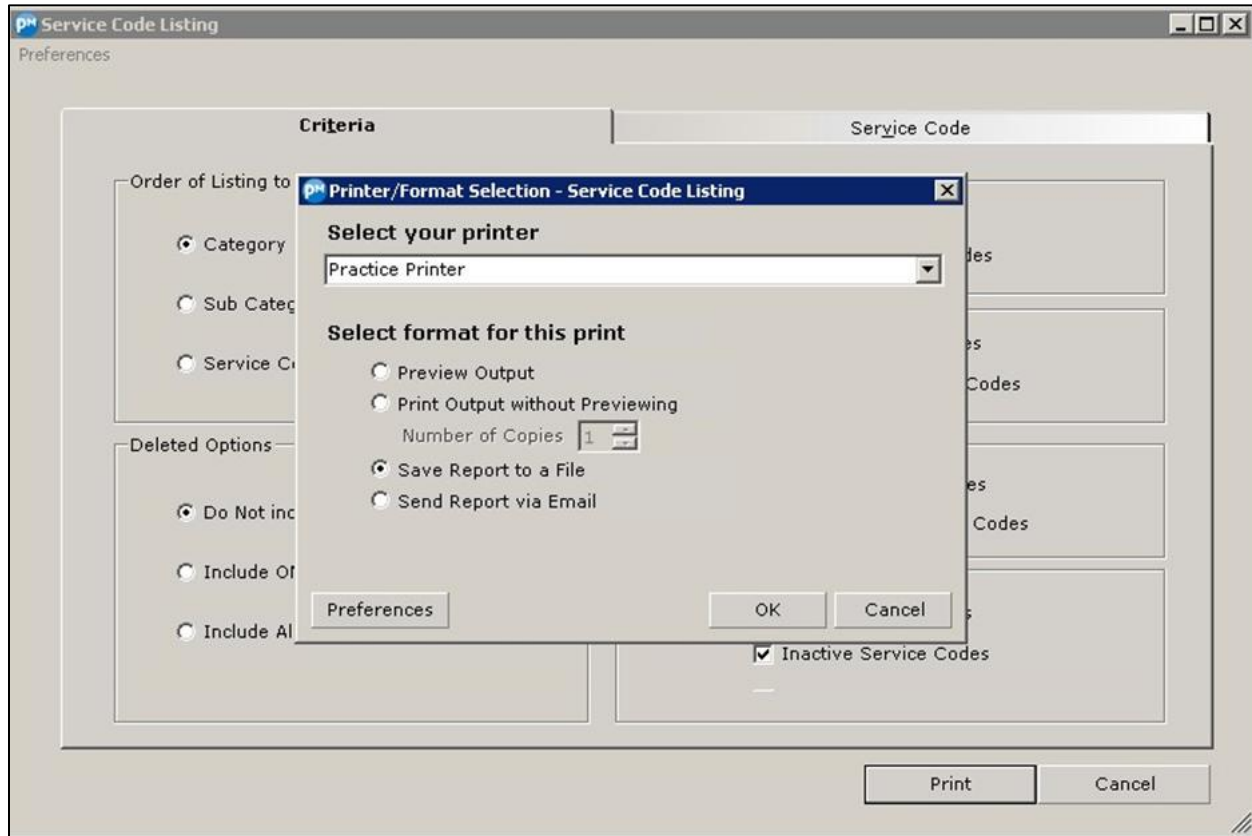
- ☒ Time Service Codes
- ☒ Expense Service Codes
- ☒ Billable Service Codes
- ☒ Non billable Service Codes
- ☒ Taxable Service Codes
- ☒ Non Taxable Service Codes
- ☒ Active Service Codes
- ☒ Inactive Service Codes

Print Cancel

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021



You can now choose one of the following:

- See the preview of your file before printing.
- Print without previewing the file.
- Save the report to a file using the option **Save Report to a File**.
- Send the report to XCM support through e-mail.

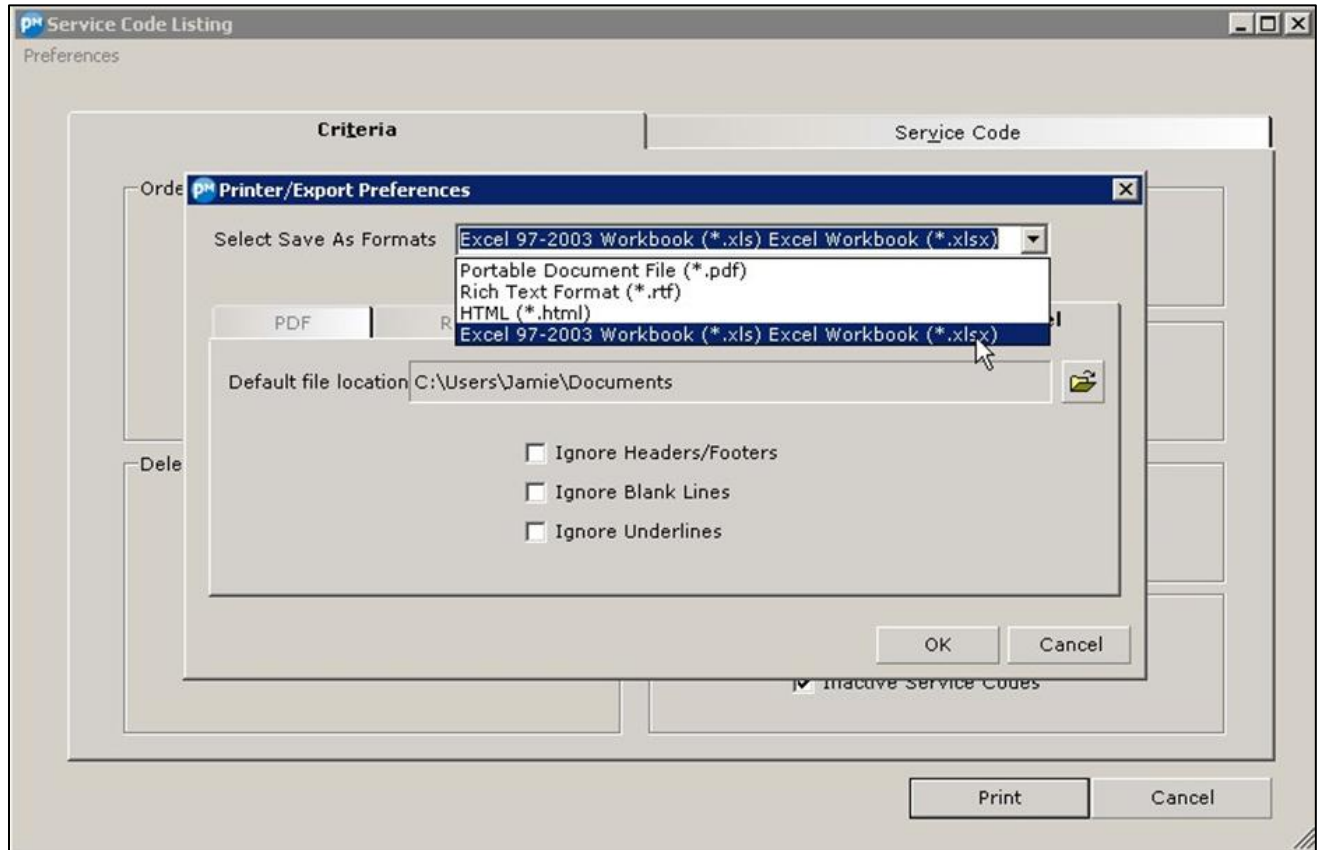
When you choose the **Save Report to a File option** button, a dialog box opens to save the file in more than one format.

To save the file in the Excel format, select Excel from the **Select Save As Formats** drop-down list.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021



Sub Category Code

Time & Billing Integration is fully dependent on the method in which the firm has established the Subcategory Code related to the established Service Code structure. Within CCH Practice Management, all Service Codes are set up using the following hierarchy: Category > Subcategory > Service Code

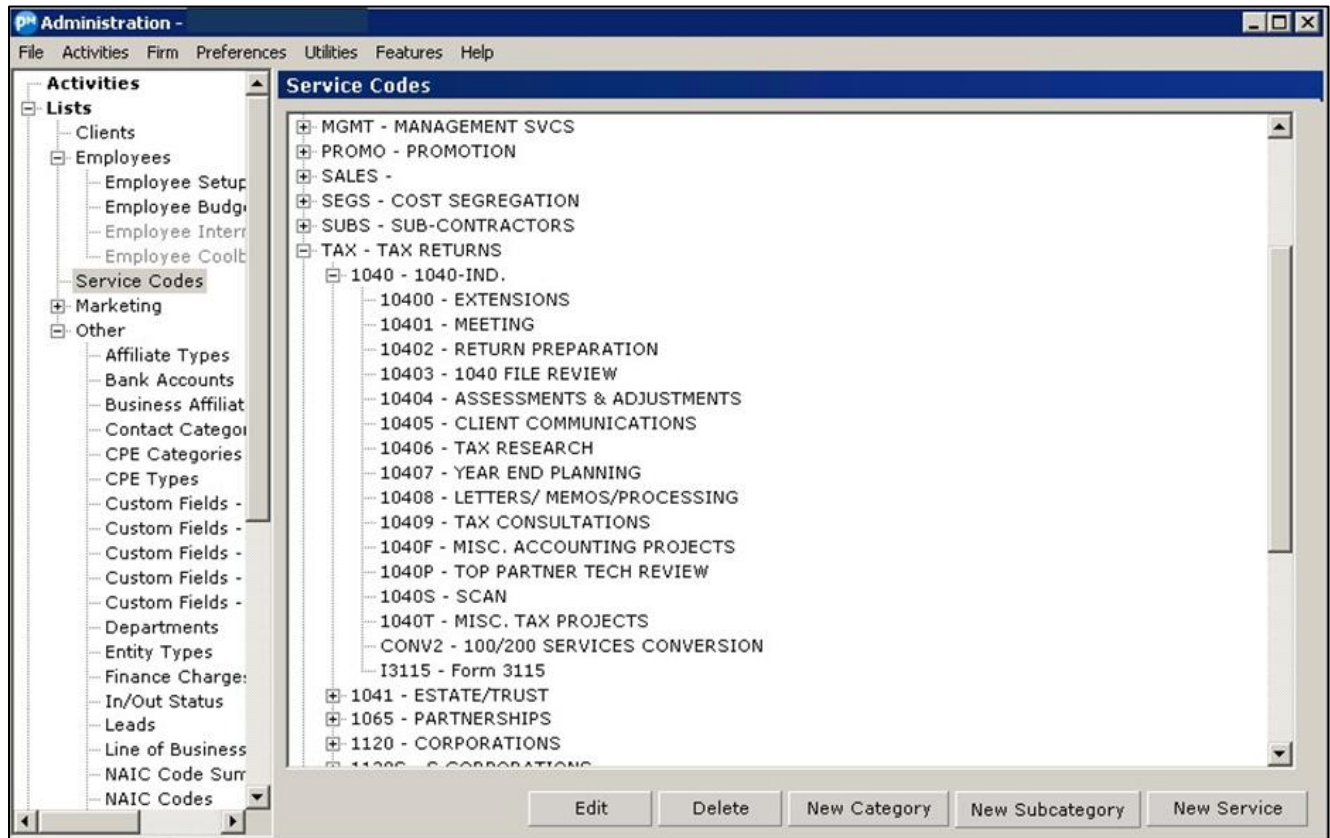
In the following example, the highlighted section illustrates the Subcategory. XCM will utilize this subcategory to dictate the flow of data between the time entered to the client engagement within CCH Practice Management and the corresponding Task related to the client within XCM Solutions.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

Example: Any Service Code utilized during time entry related to the 1040-1040 tax Subcategory would be mapped to the Tax-1040 Individual Task Type within the firm's XCM Solutions workflow product (not pictured)



Not all service codes need to be mapped. If you are tracking non-billable time in PM you can choose to exclude the service code from the mapping, no time will be carried forward. Mapping the service codes directs the released time to a specific existing Task Type within XCM. The service code mapping is limited to one Task Type per subcategory. Firms need to create new service codes as follows:

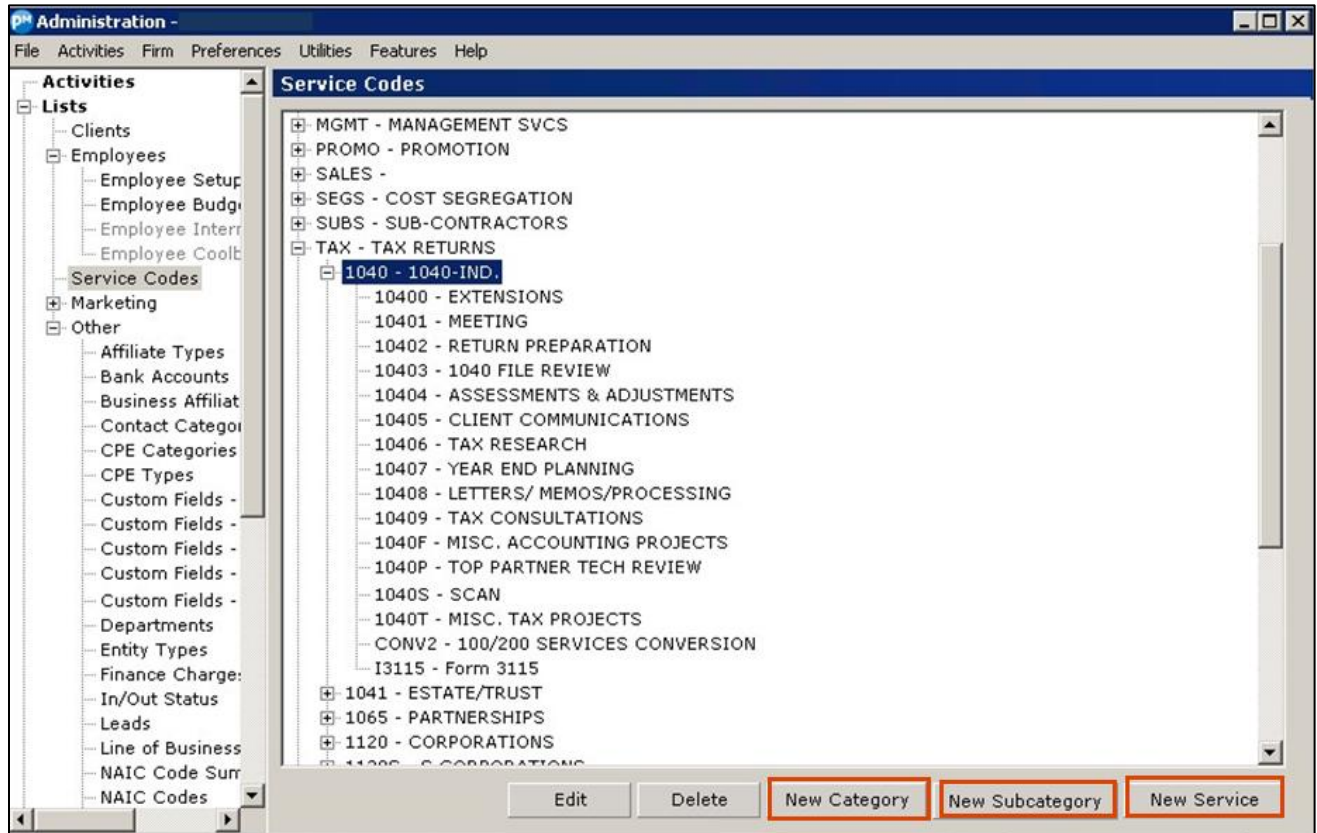
The hierarchy applied is **Category→Subcategory→ Service Code**

Go to **Administration> Lists > Service Codes**, this provides options to add a **New Category**, **New Subcategory** and **New Service**.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021



TIME ENTRY REQUIREMENT

The firm must utilize a custom field available for the Time Entry module of CCH Practice Management. The purpose of this field is to capture the period end date related to the client engagement time being entered. If this custom field is currently in use for another purpose, the client is immediately ineligible for the integration process unless the firm converts the utilization of the field for capturing the period end date.

Custom Field in Time Entry

The custom field in time entry is configured within the Firm Setup feature contained in the Administration module.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

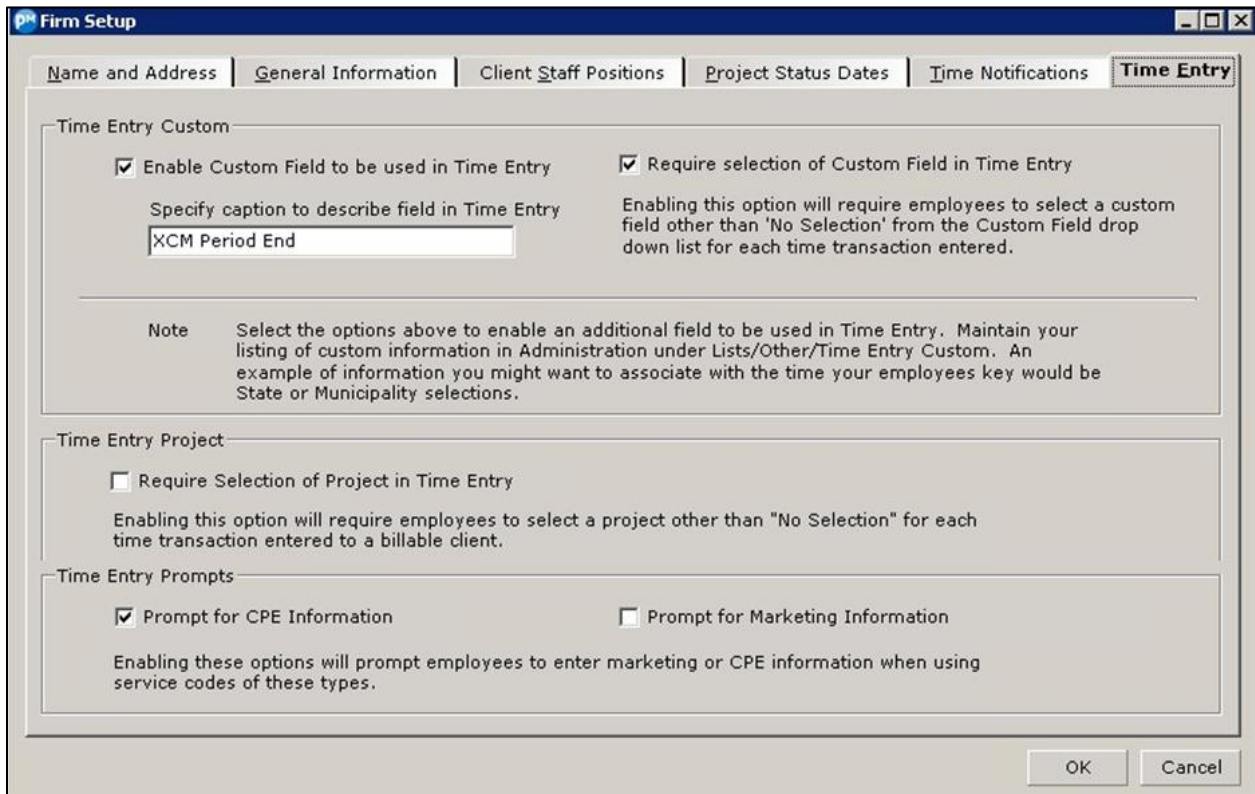


Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

Select **Firm Setup** to open the **Firm Setup** screen.



The screenshot shows the 'Firm Setup' window with the 'Time Entry' tab selected. The window has a title bar 'Firm Setup' and a menu bar with 'Name and Address', 'General Information', 'Client Staff Positions', 'Project Status Dates', 'Time Notifications', and 'Time Entry'. The 'Time Entry' tab is active, showing three sections: 'Time Entry Custom', 'Time Entry Project', and 'Time Entry Prompts'. In the 'Time Entry Custom' section, the 'Enable Custom Field to be used in Time Entry' checkbox is checked, and the 'Require selection of Custom Field in Time Entry' checkbox is also checked. A text box next to the first checkbox contains 'XCM Period End'. A note below this section explains that enabling these options will require employees to select a custom field other than 'No Selection' from the Custom Field drop down list for each time transaction entered. In the 'Time Entry Project' section, the 'Require Selection of Project in Time Entry' checkbox is unchecked. A note below this section explains that enabling this option will require employees to select a project other than 'No Selection' for each time transaction entered to a billable client. In the 'Time Entry Prompts' section, the 'Prompt for CPE Information' checkbox is checked, and the 'Prompt for Marketing Information' checkbox is unchecked. A note below this section explains that enabling these options will prompt employees to enter marketing or CPE information when using service codes of these types. At the bottom right of the window are 'OK' and 'Cancel' buttons.

In the Firm Setup screen, choose the **Time Entry** tab. You need to do the following:

- Select the **Enable Custom Field to be used in Time Entry** check box and type the caption XCM Period End.
- The **Require selection of Custom Field in Time Entry** check box selection is optional. If a firm requires the XCM Period End date for all entries, it is recommended that you do not select this check box until the integration has been finalized.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

BUSINESS RULES FOR TIME ENTRY UPDATES

The following table describes the conditions related to the Skill level mapping and the rules applied.

Scenario	Expected Results
Skill level mapped to one role:	
User listed in role, role has budget time	Time post to role
User listed in role, role does not have budget time	Time post to role, name bottom populated role
User not listed in role, role has budget time	Time post to role, name bottom populated role
User not listed in role, role does not have budget time	Time post to role, name bottom populate as secondary
Different user listed in role, role has budget time	Time post to role, name bottom populate as secondary
Different user listed in role, role does not have budget time	Time post to role, name bottom populate as secondary
Different user listed in role, role has budget time (User listed in unmapped role)	Time post to role, name bottom populate as secondary
Different user listed in role, role does not have budget time (User listed in unmapped role)	Time post to role, name bottom populate as secondary
Skill level mapped to more than one role:	
User is listed in both roles, both roles have budget time	Time post to bottom role
User is listed in both roles, top role has budget time	Time post to top role
User is listed in both roles, bottom role has budget time	Time post to bottom role
User is listed in both roles, neither role has budget time	Time post to bottom role
User is not listed in either role, both roles have budget time	Time post to bottom role, name bottom populate role
User is not listed in either role, top role has budget	Time post to top role, name bottom populate role
User is not listed in either role, bottom role has budget	Time post to bottom role, name bottom populate
User is not listed in either role, neither role has budget	Time post to bottom role, name bottom populate
Skill level mapped to more than one role, different user listed both roles	
Both roles have budget	Time post to bottom role, name bottom populate as secondary
Top role has budget	Time bottom post to the top role, name bottom populate as secondary
Bottom role has budget	Time bottom post to bottom role, name bottom populate as secondary
Neither role has budget	Time bottom post to bottom role, name bottom populate as secondary
Both roles have budget (User listed in unmapped role)	Time bottom post to bottom role, name bottom populate as secondary
Top role has budget (User listed in unmapped role)	Time post to top role, name bottom populate as secondary
Bottom role has budget (User listed in unmapped role)	Time bottom post to bottom role, name bottom populate as secondary
Neither role has budget (User listed in unmapped role)	Time bottom post to bottom role, name bottom populate as secondary

XCM FIELDS TO COMPLETE SYNCHRONIZATION

This section provides detailed information on the XCM Utilities related to the integration.

User Rights

Users must be coded within the Manage User Utility for the **Manage Integration Services** user right.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

Firm User Rights Management

Admin

- ☐ Apply Rollover
- ☐ Global User
- ☐ Access Billing Report
- ☐ Manage Shipping
- ☐ Manage Extensions
- ☐ Manage Map Workflows
- ☒ **Access Reports**
- ☐ Create New Tasks
- ☐ Create Recurring Tasks
- ☐ Do Not Rollover
- ☐ Create Extensions
- ☐ Enable Default CheckList

Professions Admin

- ☐ Manage Users
- ☐ Manage Clients / Entities
- ☐ Manage Shipping
- ☐ Manage Extensions
- ☒ **Enable Time Validation**

- ☐ Reports For Due Date Monitor (This Location)
- ☐ Outsource Coordinator
- ☐ Manage Email Alerts (System Wide)
- ☐ Manage Status (System Wide)
- ☐ Manage Task List (System Wide)
- ☐ Manage Deleted Tasks and Purge Data
- ☒ **Manage Integration Services**
- ☐ Manage Portal
- ☐ Manage System Level Reports
- ☐ Manage System Settings (System Wide)
- ☐ Manage Import (System Wide)
- ☐ Add System Specific Deliverables (System Wide)

Manage PM Skill Level Mapping

The skill levels created and applied to the PM employee profile must be mapped to the corresponding role(s) in XCM. To do this, access the Manage PM Skill Level mapping utility.

From the Utilities menu , go to One Time Mapping and then click **Manage PM Skill level Mapping**.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!


Last Updated: May 2021

External Skill Level		XCM Role Name	
External Skill level:	<input type="text" value="Partner"/>	XCM Role Name: <input type="text" value="--Select--"/>	<input type="text" value="Roles: Eng Ptr 1, Eng Ptr 2"/>
<input type="button" value="Save"/>		<input type="button" value="Delete"/> <input type="button" value="Close"/> <input type="button" value="Export"/>	
	Skill Level	Role Name	
<input type="checkbox"/>	Staff I	Preparer	
<input type="checkbox"/>	Staff II	Reviewer, Preparer	
<input type="checkbox"/>	Senior	Reviewer, Preparer	
<input type="checkbox"/>	Admin Mgmt	Responsible Person	
<input type="checkbox"/>	Partner	Responsible Person, Tax Partner, Audit Partner	
<input type="checkbox"/>	Manager	Responsible Person, Audit Partner, Tax Manager	

Choose the **External Skill Level** on the top-left of the page and the corresponding **XCM Role Name** on the right of the page. To choose multiple XCM roles, hold down the CTRL key.

Manage PM Service Code Mapping

The service codes created in PM must be mapped to the corresponding Task Type in XCM. This mapping is limited to one service code per Task Type as discussed during the qualification process.

From the Utilities menu , go to One Time Mapping and then click **Manage PM Service code Mapping**.

Select the relevant service codes from the **Practice Management Service Code** screen and apply it to the corresponding **XCM Task Type** chosen from the drop-down list at the top of the page. Not all service codes need to be mapped.

The **Export** button at the top of the screen will allow the firm to view the service code mapping in an Excel format.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

XCM Task Type

XCM Task Type:

Tax - 1040 Individual

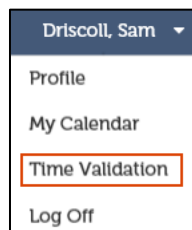
SaveCloseExport

Practice Management Service Code					XCM Task Type
	Category	SubCat	Description	Service	XCM Task Type
<input type="checkbox"/>	TAX	1040	EXTENSIONS	10400	Tax - 1040 Individual
<input type="checkbox"/>	TAX	1040	MEETING	10401	Tax - 1040 Individual
<input type="checkbox"/>	TAX	1040	RETURN PREPARATION	10402	Tax - 1040 Individual
<input type="checkbox"/>	TAX	1040	1040 FILE REVIEW	10403	Tax - 1040 Individual
<input checked="" type="checkbox"/>	TAX	1040	ASSESSMENTS & ADJUSTMENTS	10404	
<input type="checkbox"/>	TAX	1040	CLIENT COMMUNICATIONS	10405	Tax - 1040 Individual
<input checked="" type="checkbox"/>	TAX	1040	TAX RESEARCH	10406	
<input checked="" type="checkbox"/>	TAX	1040	YEAR END PLANNING	10407	
<input type="checkbox"/>	TAX	1040	TAX CONSULTATIONS	10409	Tax - 1040 Individual
<input type="checkbox"/>	TAX	1040	MISC. TAX PROJECTS	1040T	
<input type="checkbox"/>	TAX	1040	MISC. ACCOUNTING PROJECTS	1040F	
<input type="checkbox"/>	TAX	1040	TOP PARTNER TECH REVIEW	1040P	Tax - 1040 Individual
<input type="checkbox"/>	TAX	1040	Form 3115	I3115	Tax - 1040 Individual
<input type="checkbox"/>	TAX	1040	SCAN	1040S	
<input type="checkbox"/>	TAX	1041	SCAN	1041S	
<input type="checkbox"/>	TAX	1041	TOP PARTNER TECH REVIEW	1041P	Tax - 1041 Fiduciary
<input type="checkbox"/>	TAX	1041	MISC. TAX. PROJECTS	1041T	
<input type="checkbox"/>	TAX	1041	MISC. ACCTG. PROJECTS	1041F	
<input type="checkbox"/>	TAX	1041	MEETING	10411	Tax - 1041 Fiduciary
<input type="checkbox"/>	TAX	1041	RETURN PREPARATION	10412	Tax - 1041 Fiduciary
<input type="checkbox"/>	TAX	1041	FILE REVIEW	10413	Tax - 1041 Fiduciary
<input type="checkbox"/>	TAX	1041	ASSESSMENTS & ADJUSTMENTS	10414	
<input type="checkbox"/>	TAX	1041	CLIENT COMMUNICATIONS	10415	Tax - 1041 Fiduciary
<input type="checkbox"/>	TAX	1041	TAX RESEARCH	10416	
<input type="checkbox"/>	TAX	1041	YEAR END PLANNING	10417	
<input type="checkbox"/>	TAX	1041	TAX CONSULTATION	10419	Tax - 1041 Fiduciary
<input type="checkbox"/>	TAX	1041	EXTENSIONS	10410	Tax - 1041 Fiduciary
<input type="checkbox"/>	TAX	1065	EXTENSIONS	10650	Tax - 1065 Partnership

Manage User Time Exception

XCM provides two options for managing Time Exception.

- All users can manage their personal exceptions using the Time Validation feature available under the user profile located at the top-right of the My View page.




Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

- The management can view all user exceptions from the Manage User Time Exception utility. This utility will first show the entire firm exception list.

From the Utilities menu , go to One Time Mapping and then click **Manage User Time Exception** to open the following screen.

Manage User Time Exception								
User Name:								
Below is the list of PM time entries that did not get automatically mapped because of missing XCM Period End Dates. Please map a Task to each entry.								
User Name :	--Select--	Filter By :	Exception	Save	Reset	Delete	Export	Close
1	2	3	4					
Client Name	User Name	XCM Date	Service Code	Primary Task	PM Date	Hours	Task Search	XCM Role
<input type="checkbox"/>		04/04/15	10402	Tax - 1040 Individual	03/30/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		04/05/15	10402	Tax - 1040 Individual	03/31/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		03/23/15	10402	Tax - 1040 Individual	03/18/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		03/23/15	10402	Tax - 1040 Individual	03/18/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		03/31/15	10402	Tax - 1040 Individual	03/26/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		03/12/15	10402	Tax - 1040 Individual	03/07/15	3.75	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		03/25/15	10402	Tax - 1040 Individual	03/20/15	0.75	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		03/23/15	10402	Tax - 1040 Individual	03/18/15	0.50	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		04/04/15	10402	Tax - 1040 Individual	03/30/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>			REV2	FS - REVIEW	01/05/15	0.50	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		04/03/15	10652	Tax - 1065 Partnership	03/29/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		04/05/15	10403	Tax - 1040 Individual	03/31/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		04/04/15	10402	Tax - 1040 Individual	03/30/15	0.25	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		04/04/15	10402	Tax - 1040 Individual	03/30/15	1.50	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>			AU02	FS - AUDIT	02/13/15	0.75	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>			AU02	FS - AUDIT	01/13/15	0.75	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>			AU02	FS - AUDIT	01/21/15	7.00	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		04/06/15	10412	Tax - 1041 Fiduciary	04/01/15	2.50	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>
<input type="checkbox"/>		04/06/15	10652	Tax - 1065 Partnership	04/01/15	1.50	<input type="text" value="Enter Year"/>	<input type="text" value="No selection"/>


XCM offers filters to narrow down the list by user name.

Changes can be applied directly to this utility by selecting the exception, using the auto fill **Task Search** to find the Task associated, and selecting the **XCM Role** Name.

Saving will then apply the time to the task/role selected. A delete option is also available in this report. The Export button at the top of the screen enables the firm to view the exception list in an Excel format.

Import Actual Hours into XCM

PM / XCM synchronization happens nightly at midnight. If a firm needs to manually pull their time data from PM into XCM prior to the nightly run, they can do so using the **Import Actual Hours into XCM** utility.

From the Utilities menu , go to Integration Utilities and then click **Import Actual Hours into XCM** to open the following screen.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

Bulk Actual Hours Import						
Bulk Actual Update	<div>Default</div> <div>Default</div> <div>Client Name</div> <div>User LastName</div>	Release Date From		Clear	Release Date To	
				Clear		
<div>Import</div> <div>Search</div> <div>Clear</div> <div>Close</div> <div>Export</div> <div>Search Type</div> <div>Starts With</div>						
Total						
	Client Name	User Name	Posted Date	Service Code	Service Desc	Hours

Search filters allow the firm to narrow down the time data to be pulled into XCM by date range, Client Name or User LastName. You must enter the relevant date in the **Release Date From** and **Release Date To** fields. This data pulls the released time directly from the PM application.

The released time data is based upon the search criteria and this may include time already pulled into a Task. In the event that you import time data that has already been posted, it will not duplicate.

Search results can also be exported to Excel.

Do you have any questions about this Best Practices Guide or about XCM training options?


Email support@xcmsolutions.com today!

Last Updated: May 2021

Bulk Actual Hours Import						
Bulk Actual Update		Default	Release Date From		05/13/2015	Clear
			Release Date To		05/13/2015	Clear
<input type="button" value="Import"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Close"/> <input type="button" value="Export"/> Search Type <input type="button" value="Starts With"/>						
Total = 27						
	Client Name	User Name	Posted Date	Service Code	Service Desc	Hours
1			5/13/2015 12:00:00 AM	1040	EXTENSIONS	2.50
2			5/13/2015 12:00:00 AM	1040	EXTENSIONS	5.00
3			5/13/2015 12:00:00 AM	1040	EXTENSIONS	2.00
4			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
5			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
6			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
7			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
8			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
9			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
10			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
11			5/13/2015 12:00:00 AM	1065	EXTENSIONS	2.50
12			5/13/2015 12:00:00 AM	1065	EXTENSIONS	3.25
13			5/13/2015 12:00:00 AM	1065	EXTENSIONS	3.25

Manage Settings and Defaults

When the databases have been linked and the mapping is complete, the last step for the integration is to turn on the synchronization. This is done within the Manage Settings and Defaults utility.

From the Utilities menu , go to Setup Utilities and then click **Manage Settings and Defaults** to open the **Firm Settings** screen.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

XCM®
My View
Reports
Scheduler

Firm Settings

[+] Default Settings
[+] EDIT Role Names
[+] Custom Grid
[+] Scheduler Status Grouping
[+] Firm Option Fields For Task Routing Sheet
[+] Manage User
[+] Firm Display Calendar Schedule
[-] Integration Settings

System clients/entities are imported from :

Practice Management

System documents are attached from :

CCH 3.6/3.9

Client/Entity Import Settings

☐ I am importing clients/entities from another system, you cannot add clients/entities directly into XCM.
☐ I am importing clients/entities from another system, you cannot update the mapped fields.
☐ Update client/entity details from another system to all active Tasks (Completed).

☒ Update Actual Hours from another system.

Click the **Integration Settings** to expand the options and select the **Update Actual Hours from another system** check box under **Client/Entity Import Settings**.

Be sure to save the integration settings. When the settings are saved, all future released times for linked clients will post to the corresponding Task based upon the mapping completed.

If you have additional questions please email support@xcmsolutions.com

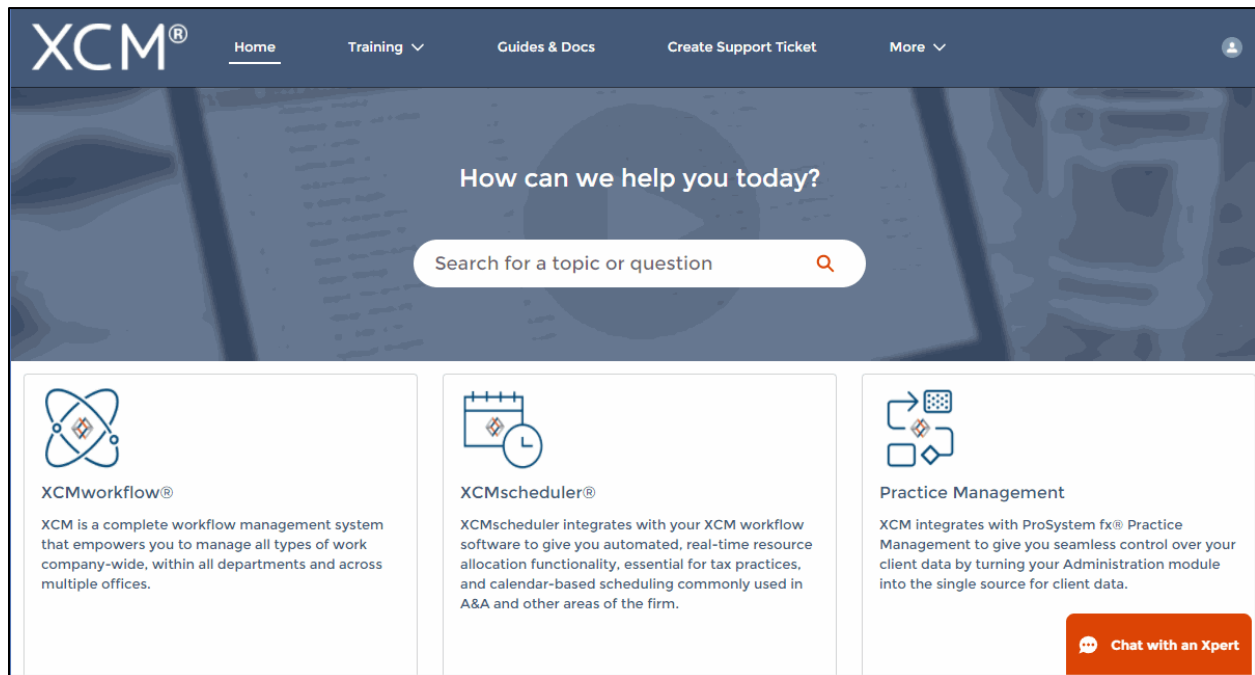
Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

HELP CENTER

The Help Center is accessible directly from your firm's site through the Help link in the upper right-hand corner of your screen, providing access to User Guides, Training, and Support.



Training

- XCM developed a comprehensive training program that empowers users to begin using the software quickly. Unlimited access to live web-based training highlighting key areas of functionality will help you and your team maximize the use of XCM.
- The schedule for the Web Based Training Sessions is available in the Help Center.

Guides and Docs

- A library of on-demand Web Courses complements the live web-based trainings, with a focus on key functions and best practices. A full User Guide outlining all the relevant elements of the XCM software including all utilities and advanced functionality, as well as an overview of all the reports in XCM is also available.

User Support

- XCM provides multiple levels of support including email responses, escalated phone support and interactive web-based support. Our support team utilizes Ring Central software that allows us to troubleshoot specific issues remotely and take control of users' desktops if required.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

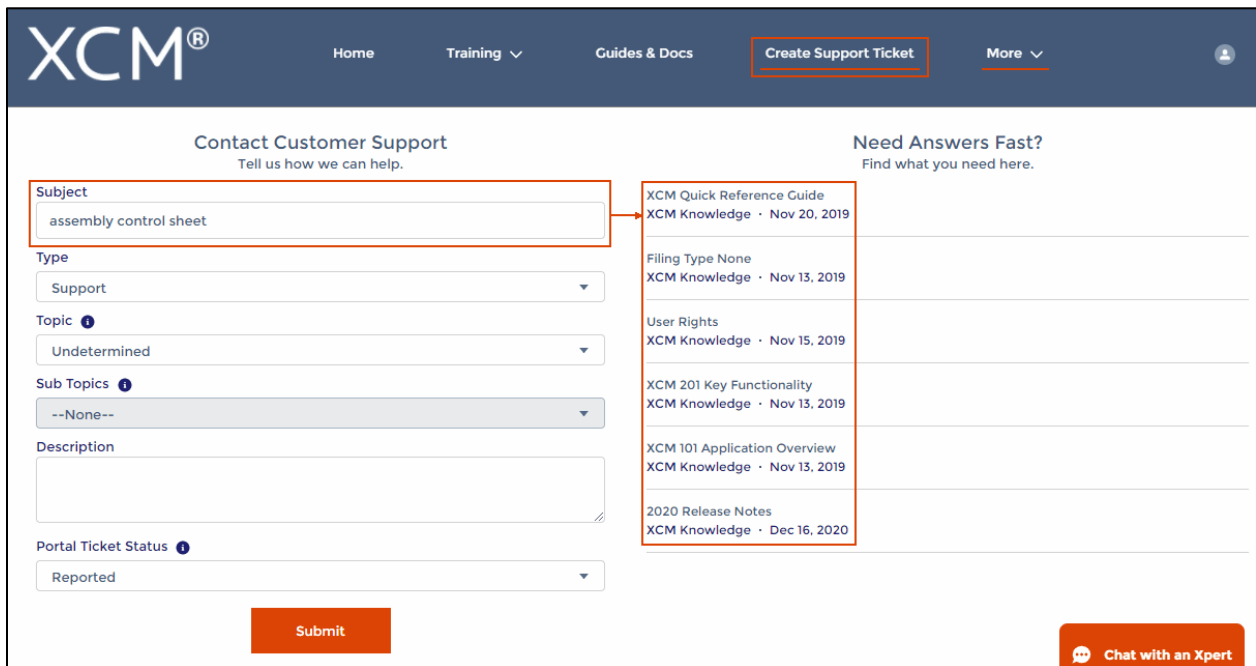
- XCM has a 95% success rate for responding to all online inquiries within 2 hours. Users are encouraged to submit a request to create a **Support Ticket** with the description and type of support required. For faster response, an online **Chat** help is available between 9 a.m. and 5 p.m. EST, Monday through Friday.
- Users can also submit all inquiries to support@xcmsolutions.com, if your inquiry requires a direct response via phone or a remote meeting, your ticket will be escalated to the appropriate client service representative. Support hours are 7:00 a.m.–10:00 p.m. EST, Monday through Friday, with extended support on Saturdays and Sundays from January 1–April 30.

Some guidelines to Create a Support Ticket

In the **Create Support Ticket** page, the following levels of support are available.

1. Preliminary assistance through Self Help Docs

When you type a keyword in the **Subject** field, related documents are displayed on the right side of the page. You can review these documents for first-level information on the topic you are seeking.



Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021

2. Create a Support Ticket

A support ticket can be raised by providing the following information.

Contact Customer Support

Tell us how we can help.

Subject

Type

Support
▼

Topic ⓘ

My View
▼

Sub Topics ⓘ

Task Information
▼

Description

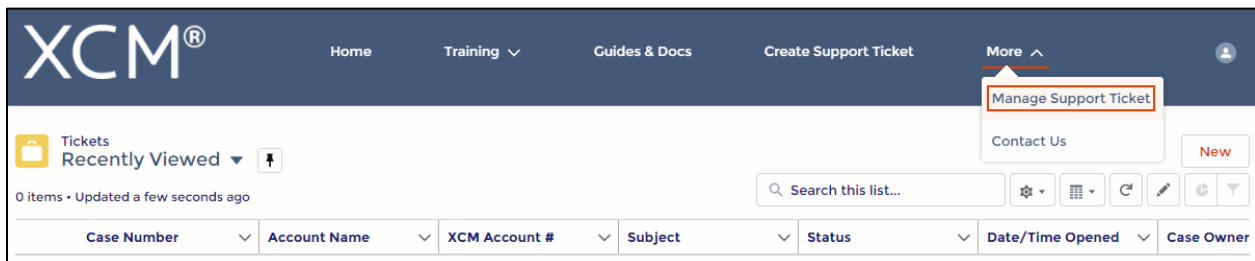
Assembly details

Portal Ticket Status ⓘ

Reported
▼

Submit

Users can monitor the status of their open support tickets through the **Manage Support Ticket** option.



The screenshot shows the XCM portal header with navigation links: Home, Training, Guides & Docs, Create Support Ticket, and More. The 'More' dropdown menu is open, highlighting 'Manage Support Ticket' and 'Contact Us'. Below the header, there is a 'Tickets' section with a 'Recently Viewed' filter and a table of tickets. The table has columns: Case Number, Account Name, XCM Account #, Subject, Status, Date/Time Opened, and Case Owner. The table is currently empty, showing '0 items'.

Do you have any questions about this Best Practices Guide or about XCM training options?

Email support@xcmsolutions.com today!

Last Updated: May 2021