



Accelerated Workflow Automation

XCM and CCH Axcess Client Integration Database Mappings Guide

October 2020

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Last Updated: May 2021

Contents

CLIENT INTEGRATION MAPPINGS – OVERVIEW	3
Access Fields.....	3
XCM Client Details Page	7
API and Mapping Utility within XCM.....	9
Help Center	14

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CLIENT INTEGRATION MAPPINGS – OVERVIEW

This document contains information about the default database field mappings between CCH Axxess and XCM as they relate to the XCM Client Integration process.

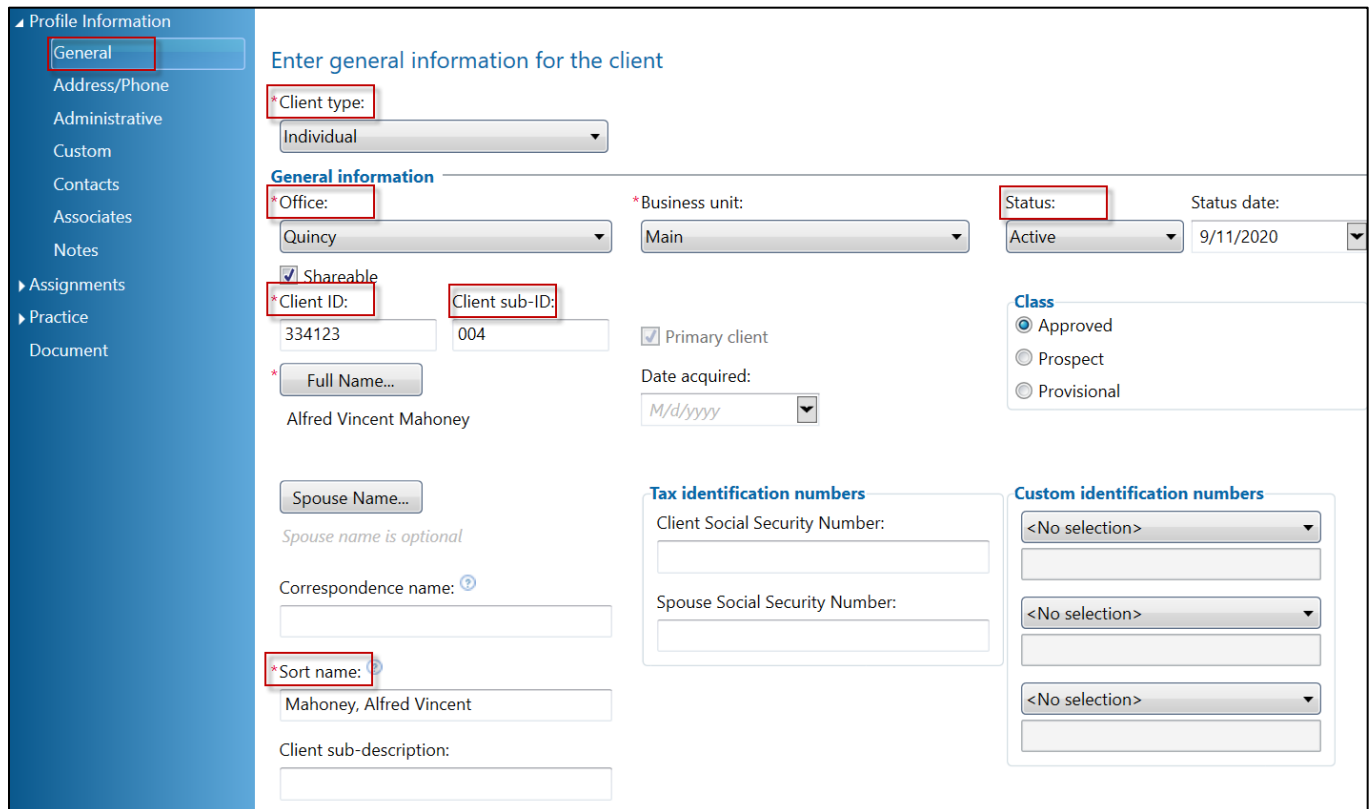
These default mappings may need to be modified during installation to accommodate each firm's use of Axxess fields and how they should be carried over into XCM during the import of new clients or synchronization of existing linked clients as changes are made in Axxess.

Fields can be excluded from the mapping table, and/or one Axxess staffing field can be mapped to more than one XCM staffing role.

Axxess Fields

The following screenshots include the Client Manager, client profile pages displaying fields that are mapped to XCM fields.

Client Manager - Profile Information: General



Profile Information

- General
- Address/Phone
- Administrative
- Custom
- Contacts
- Associates
- Notes
- Assignments
- Practice
- Document

Enter general information for the client

*Client type: Individual

General information

*Office: Quincy *Business unit: Main Status: Active Status date: 9/11/2020

☒ Shareable

*Client ID: 334123 Client sub-ID: 004

☒ Primary client

*Full Name: Alfred Vincent Mahoney Date acquired: M/d/yyyy

Class

- ☒ Approved
- ☐ Prospect
- ☐ Provisional

Tax identification numbers

Client Social Security Number:

Spouse Social Security Number:

Custom identification numbers

<No selection>

<No selection>

<No selection>

Spouse Name: Spouse name is optional

Correspondence name: ?

*Sort name: Mahoney, Alfred Vincent

Client sub-description:

Client type will be logically mapped to a corresponding XCM entity type through an XCM integration utility available to the firm.

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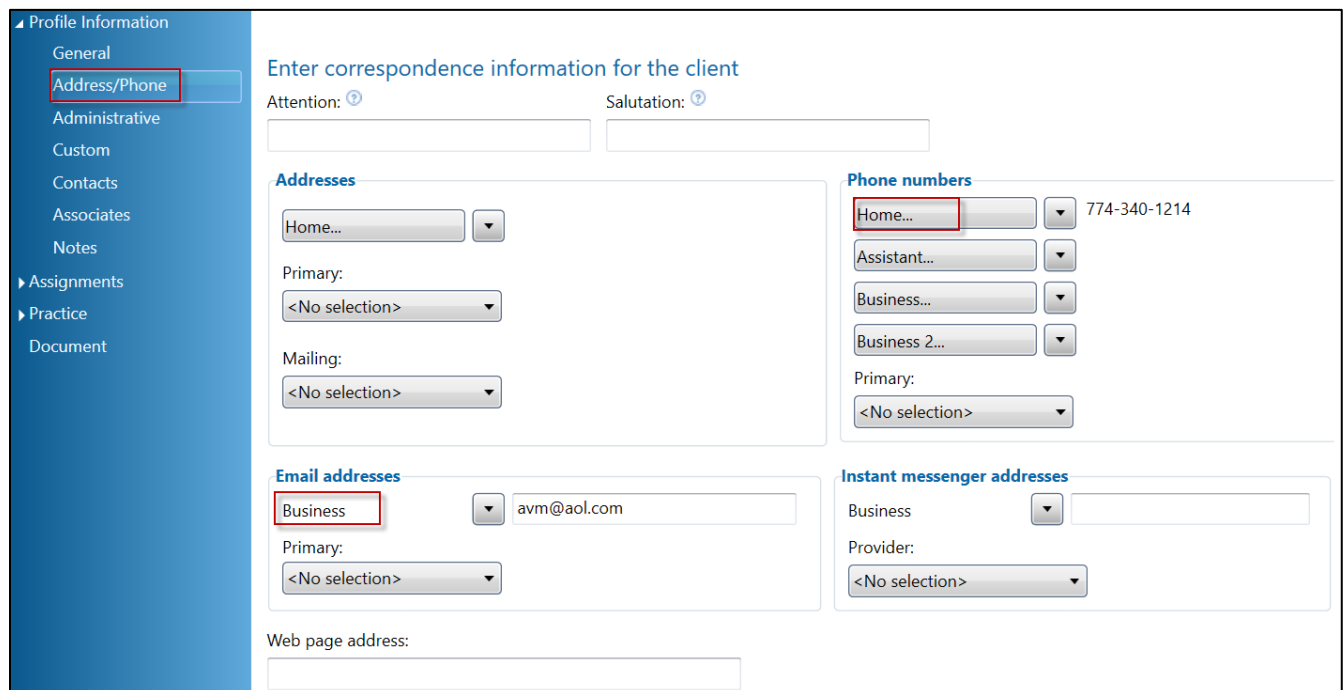
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The integration uses **Sort name** field for both entities (copies the fields exactly as it is), and for individuals (constructs last, first middle names). XCM parses the Sort name field to create a first and last name, the delimiter is the first comma (or, if no commas, the first space). Text prior to the first comma becomes the XCM Last Name / Entity Name, and text after the first comma becomes the XCM First Name.

The Office field is mapped to a corresponding XCM **Originating Location** through an XCM integration utility. Every client must have an office selected and mapped for XCM to recognize the client.

The XCM Client Account Number field is a concatenation of the **Client ID** and **Client sub-ID** fields, separated by a period. In the case above, the XCM Client Account Number would be 334123.004. When XCM does its initial automatic linking, it matches clients based solely on the Account Number field. As a result, if clients already exist in both Axxess and XCM, the better the overall match between account numbers, the more efficient and thorough the initial automatic linking will be. Importing clients will automatically generate the matching XCM Client Account Number by combining the two ids. For firms who do not use the Client sub-ID, XCM integration can be configured to ignore the field and instead just use the Client ID as the XCM Client Account Number.

Client Manager - Profile Information: Address/Phone



Profile Information

- General
- Address/Phone**
- Administrative
- Custom
- Contacts
- Associates
- Notes
- Assignments
- Practice
- Document

Enter correspondence information for the client

Attention: Salutation:

Addresses

Home...

Primary:

Mailing:

Phone numbers

Home... 774-340-1214

Assistant...

Business...

Business 2...

Primary:

Email addresses

Business avm@aol.com

Primary:

Instant messenger addresses

Business

Provider:

Web page address:

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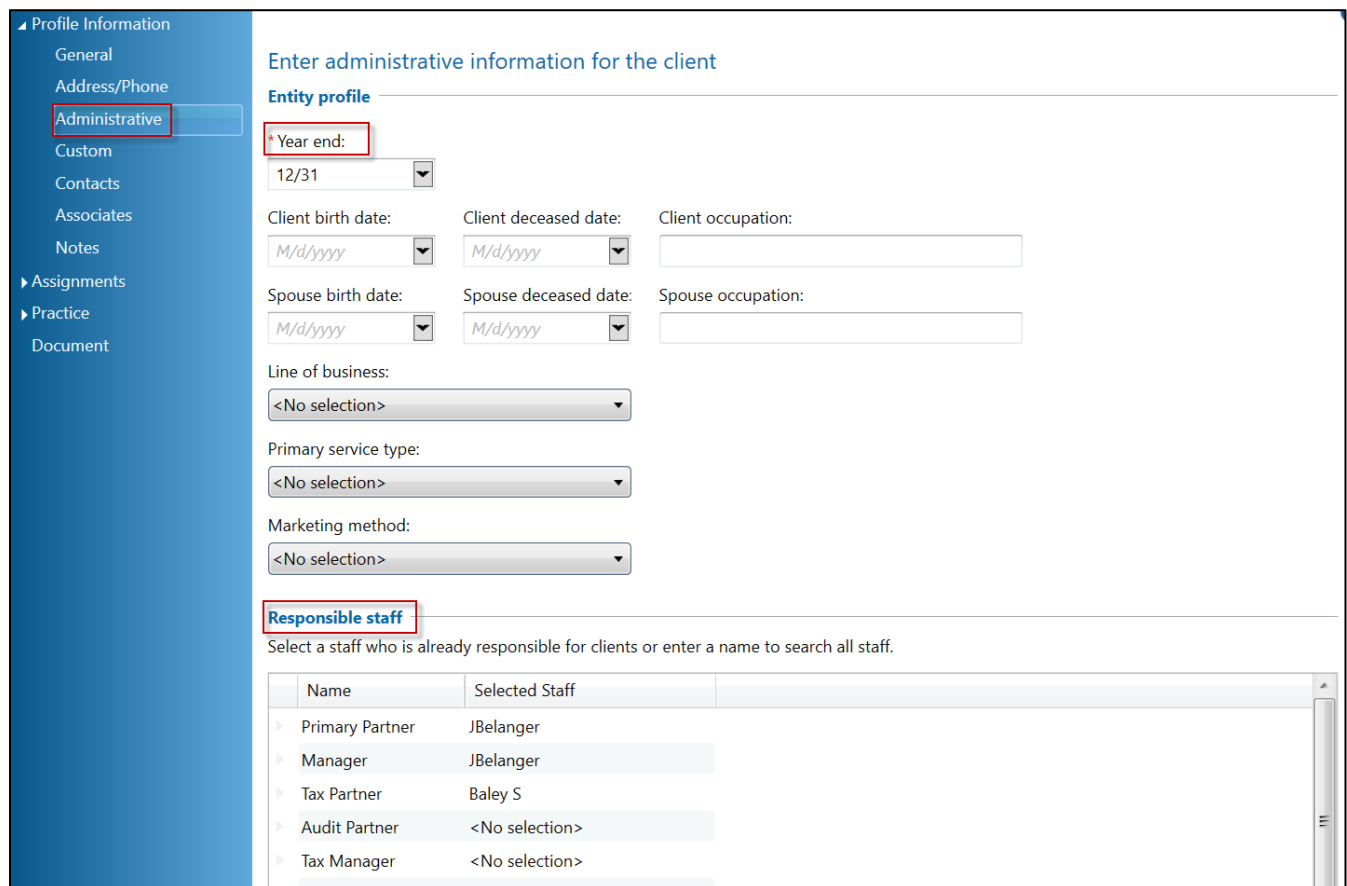
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The first **Phone number** field is mapped to the XCM **Client Phone Number** field. The phone number format follows the standard 10-digit United States theme and XCM will truncate any extra characters.

The **Email address** maps to the XCM Client e-mail field. An accurate email address for the client is important for two reasons: XCM's Points email generation from within a Task uses it to send requests for information to the client; and if the firm utilizes eFile mail within XCM, the email generates to the email address on file.

Client Manager - Profile Information: Administrative



Profile Information

- General
- Address/Phone
- Administrative
- Custom
- Contacts
- Associates
- Notes
- Assignments
- Practice
- Document

Enter administrative information for the client

Entity profile

Year end: 12/31

Client birth date: M/d/yyyy

Client deceased date: M/d/yyyy

Client occupation:

Spouse birth date: M/d/yyyy

Spouse deceased date: M/d/yyyy

Spouse occupation:

Line of business: <No selection>

Primary service type: <No selection>

Marketing method: <No selection>

Responsible staff

Select a staff who is already responsible for clients or enter a name to search all staff.

Name	Selected Staff
Primary Partner	JBelanger
Manager	JBelanger
Tax Partner	Baley S
Audit Partner	<No selection>
Tax Manager	<No selection>

The **Year end** field will appear in XCM as mm/dd.

Responsible staff assignments are mapped to XCM staffing assignments. Depending on the firm's use of each, those defaults may need to be changed during installation and/or one Axxess role mapped to more than one XCM role.

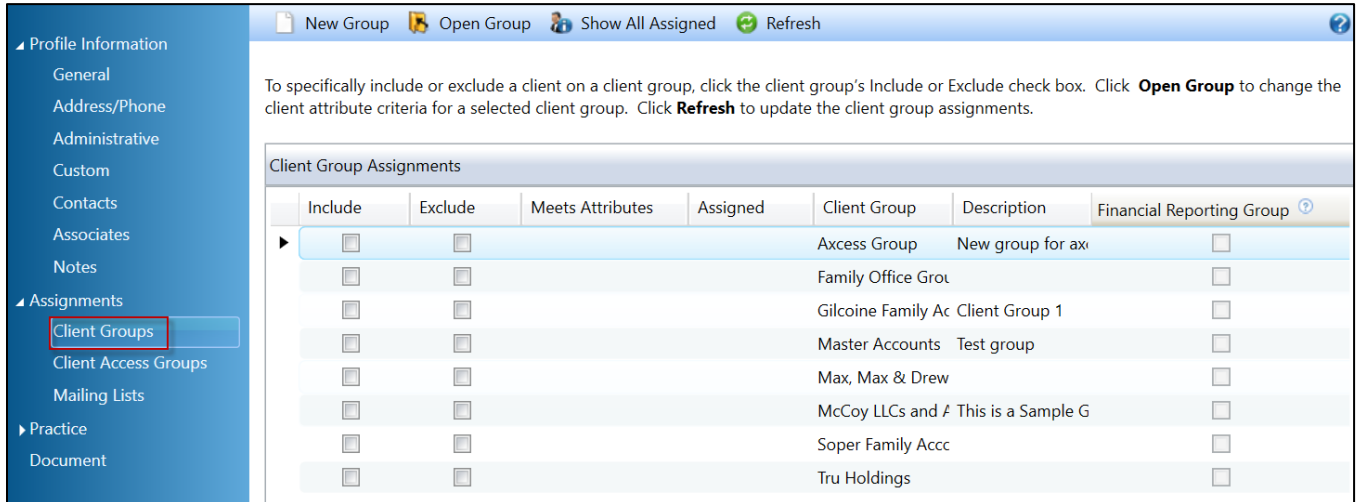
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The XCM Responsible Person (top role if renamed) role is required in XCM and affects workflow processes, so to optimize new client imports and synchronization it is important to map a valid and always populated Axxess staffing assignment to the XCM Responsible Person. Since both applications allow labeling of staffing roles, firms can easily match the name of each XCM staffing role to its associated Axxess staffing role.

Client Manager - Assignments: Client Groupings



To specifically include or exclude a client on a client group, click the client group's Include or Exclude check box. Click **Open Group** to change the client attribute criteria for a selected client group. Click **Refresh** to update the client group assignments.

Include	Exclude	Meets Attributes	Assigned	Client Group	Description	Financial Reporting Group
<input type="checkbox"/>	<input type="checkbox"/>			Axxess Group	New group for axi	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			Family Office Gro		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			Gilcoine Family Ac Client Group 1		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			Master Accounts	Test group	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			Max, Max & Drew		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			McCoy LLCs and / This is a Sample G		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			Soper Family Accc		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			Tru Holdings		<input type="checkbox"/>

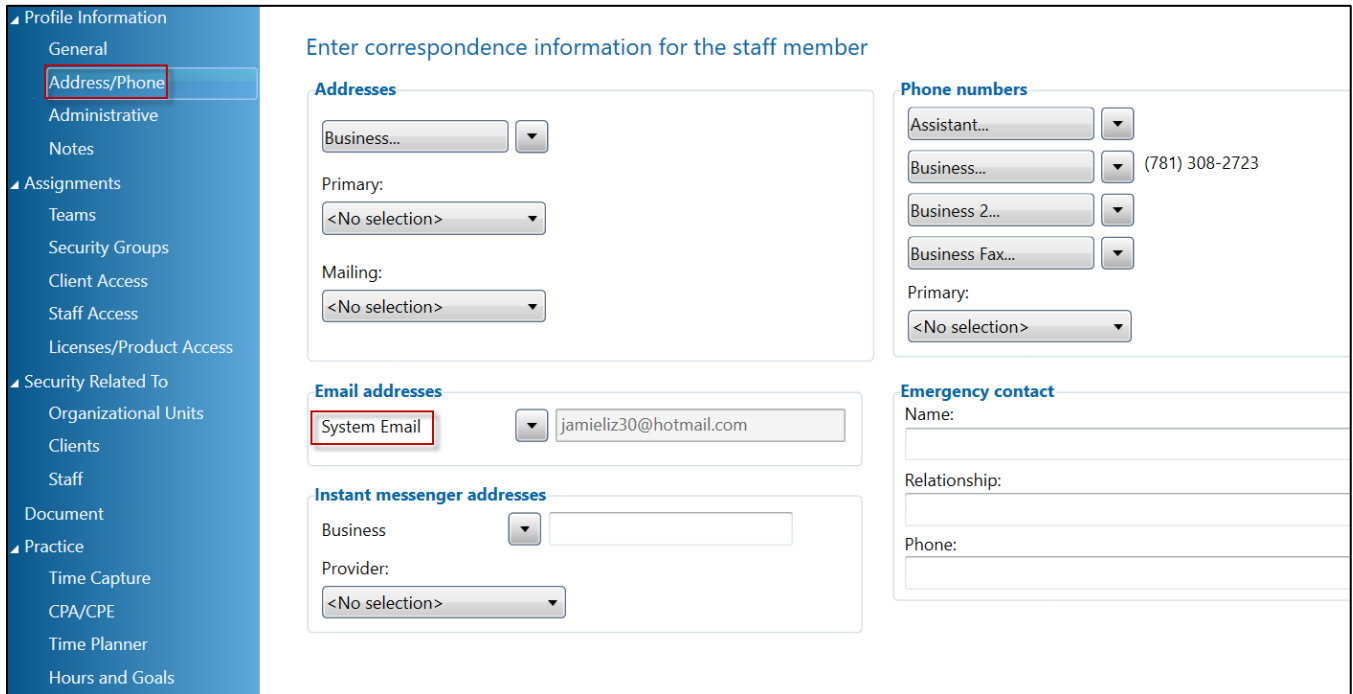
XCM will import and synchronize the **Client Group** field with the XCM client group field. Best practices suggest that creating matching groups in Axxess and XCM, and assigning Axxess clients to the desired groups is the most efficient way to organize and synchronize clients for administrative purposes. If an identically named group exists in XCM, when the client is imported, it will automatically be added to that group. If the group does not exist in XCM, a new group will be added to XCM and the client will be assigned to it.

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Staff Manager –Staff Profile: Address/Phone



Profile Information

- General
- Address/Phone**
- Administrative
- Notes

Assignments

- Teams
- Security Groups
- Client Access
- Staff Access
- Licenses/Product Access

Security Related To

- Organizational Units
- Clients
- Staff

Document

Practice

- Time Capture
- CPA/CPE
- Time Planner
- Hours and Goals

Enter correspondence information for the staff member

Addresses

Business... ▼

Primary: <No selection> ▼

Mailing: <No selection> ▼

Phone numbers

Assistant... ▼

Business... ▼ (781) 308-2723

Business 2... ▼

Business Fax... ▼

Primary: <No selection> ▼

Email addresses

System Email ▼ janieliz30@hotmail.com

Instant messenger addresses

Business ▼

Provider: <No selection> ▼

Emergency contact

Name:

Relationship:

Phone:

XCM connects users via an employee's email address from the system email field when matching staff assignments. It must exactly match the user's login email address in XCM or user role mapping synchronization will not work.

XCM Client Details Page

Client Integration synchronizes the above Axxess fields with XCM fields appearing in the top portion of the XCM Client Details screen and updates the XCM data with changes to data through synchronization jobs.

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XCM Client Profile

Client/Entity Details			
Client/Entity Type	Individual	Disable Client/Entity	<input type="checkbox"/> Yes
First Name	Alfred	Client/Entity Group	NONE Clear Choose
Middle Name	Vincent	Client/Entity Group Number	
Last Name / Entity Name	Mahoney	Responsible Person	Belanger, Jamie Choose
Suffix	--Select--	Tech Reviewer	Smith, Baley Choose
Client/Entity e-mail	avm@aol.com	Reviewer	Choose
Client/Entity Phone Number	(774)340-1214	Preparer	Choose
Client/Entity Account No.	334123.004	Bill Manager	Choose
Originating Location	Quincy	X	Choose
Primary Task Type	Tax - 1040 Individual	XX	Choose
Portal client/entity	No	XXX	Choose
		XXXX	Choose
		XXXX	Choose
		Fiscal Year End	12/31 (mm/dd)

Save Close

Recommendation: ALWAYS select a Primary Task Type and enter a Fiscal Year End

PM Integration

This client has been linked to external client **Mahoney, Alfred Vincent** Remove Link

Client/Entity Id: 334123.004
 Client/Entity Name: Mahoney, Alfred Vincent
 Client/Entity Type: INDIVIDUAL
 Industry:
 Emailid: avm@aol.com
 PhoneNumber: 774-340-1214

The information in the lower part of the XCM Client Details screen provides information from Axxess about the linked client and is used for reference.

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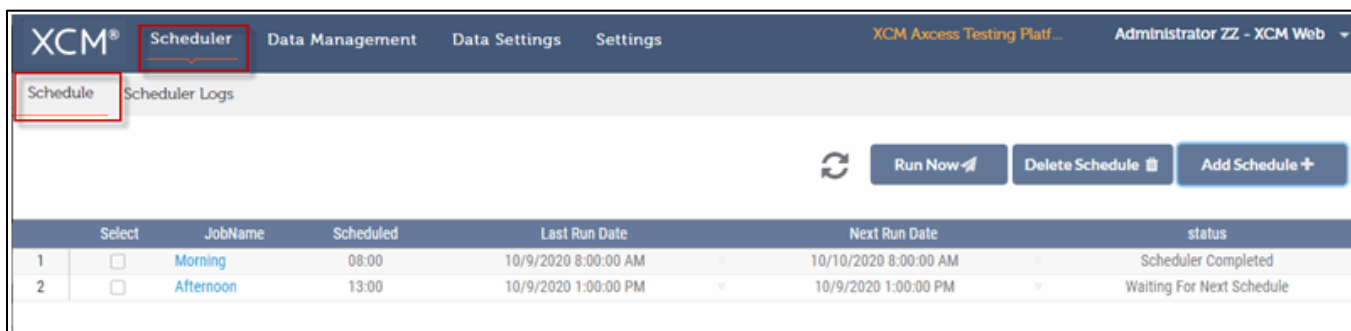
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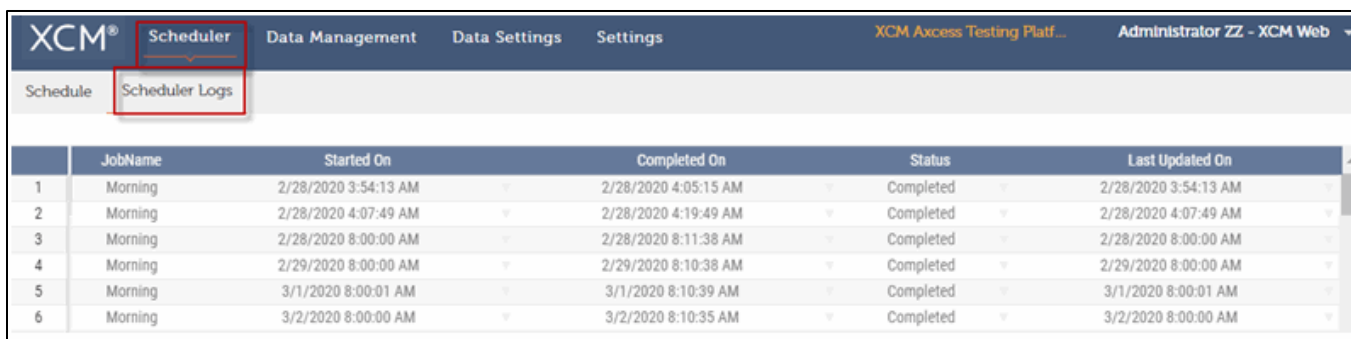
API and Mapping Utility within XCM

The XCM integration utility allows the firm to maintain the mapping and synchronization through API connection.

Integration Utility – Scheduler



Select	JobName	Scheduled	Last Run Date	Next Run Date	status
1	Morning	08:00	10/9/2020 8:00:00 AM	10/10/2020 8:00:00 AM	Scheduler Completed
2	Afternoon	13:00	10/9/2020 1:00:00 PM	10/9/2020 1:00:00 PM	Waiting For Next Schedule



	JobName	Started On	Completed On	Status	Last Updated On
1	Morning	2/28/2020 3:54:13 AM	2/28/2020 4:05:15 AM	Completed	2/28/2020 3:54:13 AM
2	Morning	2/28/2020 4:07:49 AM	2/28/2020 4:19:49 AM	Completed	2/28/2020 4:07:49 AM
3	Morning	2/28/2020 8:00:00 AM	2/28/2020 8:11:38 AM	Completed	2/28/2020 8:00:00 AM
4	Morning	2/29/2020 8:00:00 AM	2/29/2020 8:10:38 AM	Completed	2/29/2020 8:00:00 AM
5	Morning	3/1/2020 8:00:01 AM	3/1/2020 8:10:39 AM	Completed	3/1/2020 8:00:01 AM
6	Morning	3/2/2020 8:00:00 AM	3/2/2020 8:10:35 AM	Completed	3/2/2020 8:00:00 AM

Firms control the frequency of the synchronization of data updates through the scheduler tab. Schedules can be set on an hourly basis and run on demand if needed. This will update changes to the client profile in Axxess with corresponding sync'd clients in the XCM profile.

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Integration Utility – Data Management

XCM® Scheduler
Data Management
Data Settings
Settings
XCM Access Testing Platf...
Administrator ZZ - XCM Web

Import & Exclude Client
Import Actual Hours
Link XCM Clients To External Clients

Client ID

Entity Type

Client Last/Entity Name

Office

☒ Not Imported / New Client(s)
☐ Not Linked
☐ Excluded
☐ Both (Not Linked & Excluded)

Import
Exclude

Search Type

☐ Show Inactive clients

Clear
Search

	Select	Client ID/Account No	Client Name	PM Client Type	XCM Client Type	Location	Email ID	Phone Number	Status
1	<input type="checkbox"/>	AJ88.77	A Lack of Space	CORPORATION	Entity	BOS			Active
2	<input type="checkbox"/>	AS88.TAX	A Mirrored Image	CORPORATION	Entity	BOS			Active
3	<input type="checkbox"/>	AK88	A Rise Above	CORPORATION	Entity	BOS			Active
4	<input type="checkbox"/>	C001.00	Aim My Goal LLC	CORPORATION	Entity	BOS			Active
5	<input type="checkbox"/>	Arm.000	AMax Tax LLP	CORPORATION	Entity	Quincy	armanino115551@cpas.com	(889)911-2244	Active
6	<input type="checkbox"/>	BL55.TAX	Armorol & Morane	FIDUCIARY	Entity	BOS		(987)987-9879	Active
7	<input type="checkbox"/>	Axe.002	Aronson Corp	CORPORATION	Entity	BOS			Active
8	<input type="checkbox"/>	s12	BAA Corp	CORPORATION	Entity	BOS			Active

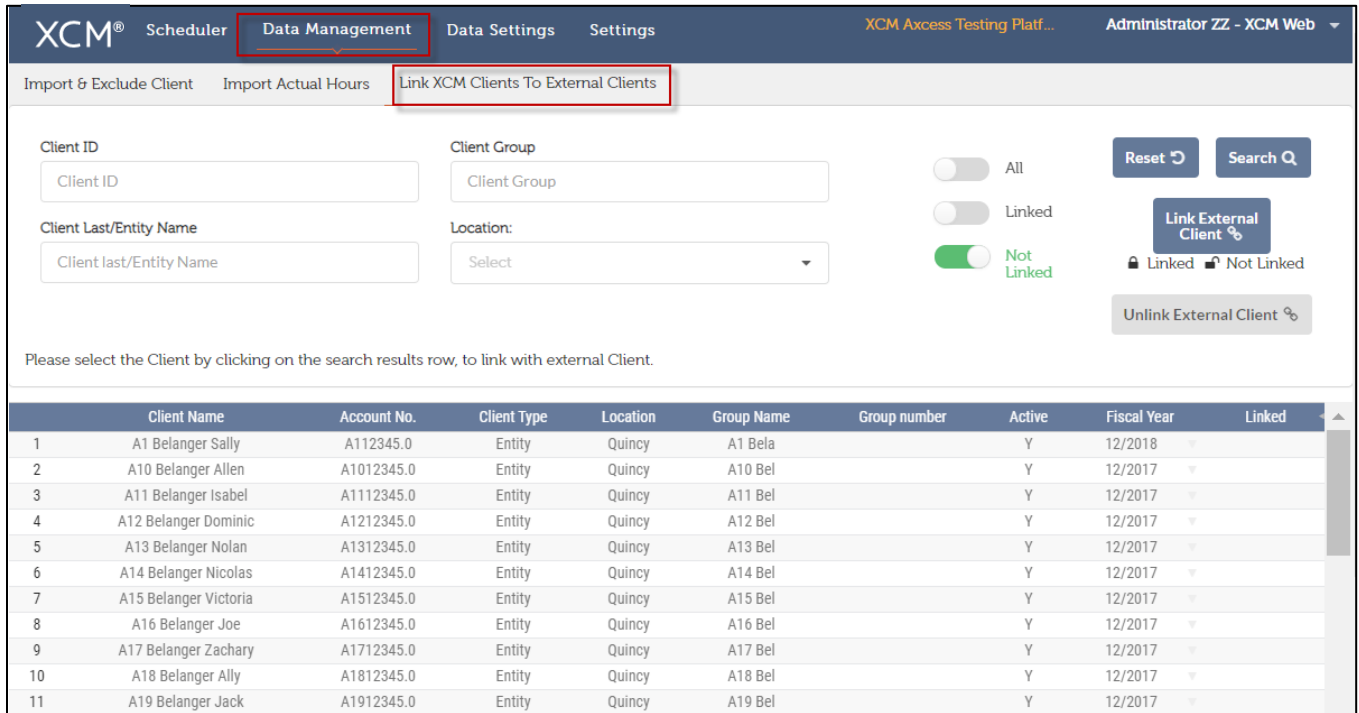
Importing or excluding clients to XCM is maintained in the Data Management tab. This provides the firm with control over the clients that are created in XCM and the ability to exclude the clients from the application.

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Integration Utility – Link XCM Clients to External Clients



Client ID:

Client Group:

Client Last/Entity Name:

Location:

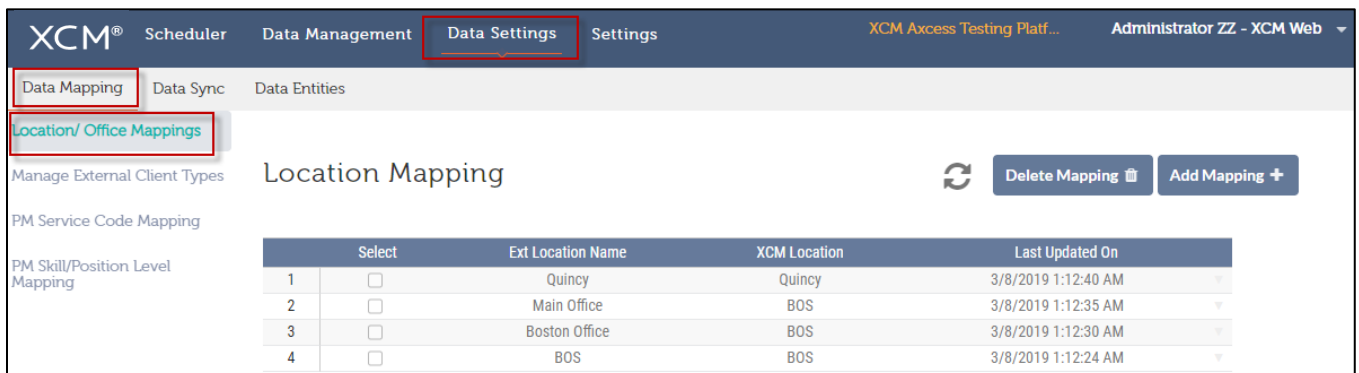
☐ All ☐ Linked ☒ Not Linked

Please select the Client by clicking on the search results row, to link with external Client.

	Client Name	Account No.	Client Type	Location	Group Name	Group number	Active	Fiscal Year	Linked
1	A1 Belanger Sally	A112345.0	Entity	Quincy	A1 Bela		Y	12/2018	
2	A10 Belanger Allen	A1012345.0	Entity	Quincy	A10 Bel		Y	12/2017	
3	A11 Belanger Isabel	A1112345.0	Entity	Quincy	A11 Bel		Y	12/2017	
4	A12 Belanger Dominic	A1212345.0	Entity	Quincy	A12 Bel		Y	12/2017	
5	A13 Belanger Nolan	A1312345.0	Entity	Quincy	A13 Bel		Y	12/2017	
6	A14 Belanger Nicolas	A1412345.0	Entity	Quincy	A14 Bel		Y	12/2017	
7	A15 Belanger Victoria	A1512345.0	Entity	Quincy	A15 Bel		Y	12/2017	
8	A16 Belanger Joe	A1612345.0	Entity	Quincy	A16 Bel		Y	12/2017	
9	A17 Belanger Zachary	A1712345.0	Entity	Quincy	A17 Bel		Y	12/2017	
10	A18 Belanger Ally	A1812345.0	Entity	Quincy	A18 Bel		Y	12/2017	
11	A19 Belanger Jack	A1912345.0	Entity	Quincy	A19 Bel		Y	12/2017	

Link XCM Clients to External Clients provides the ability to review and update existing XCM clients that have not been linked to a corresponding Axxess client.

Integration Utility –Data Settings



Manage External Client Types

PM Service Code Mapping

PM Skill/Position Level Mapping

Location Mapping

	Select	Ext Location Name	XCM Location	Last Updated On
1	<input type="checkbox"/>	Quincy	Quincy	3/8/2019 1:12:40 AM
2	<input type="checkbox"/>	Main Office	BOS	3/8/2019 1:12:35 AM
3	<input type="checkbox"/>	Boston Office	BOS	3/8/2019 1:12:30 AM
4	<input type="checkbox"/>	BOS	BOS	3/8/2019 1:12:24 AM

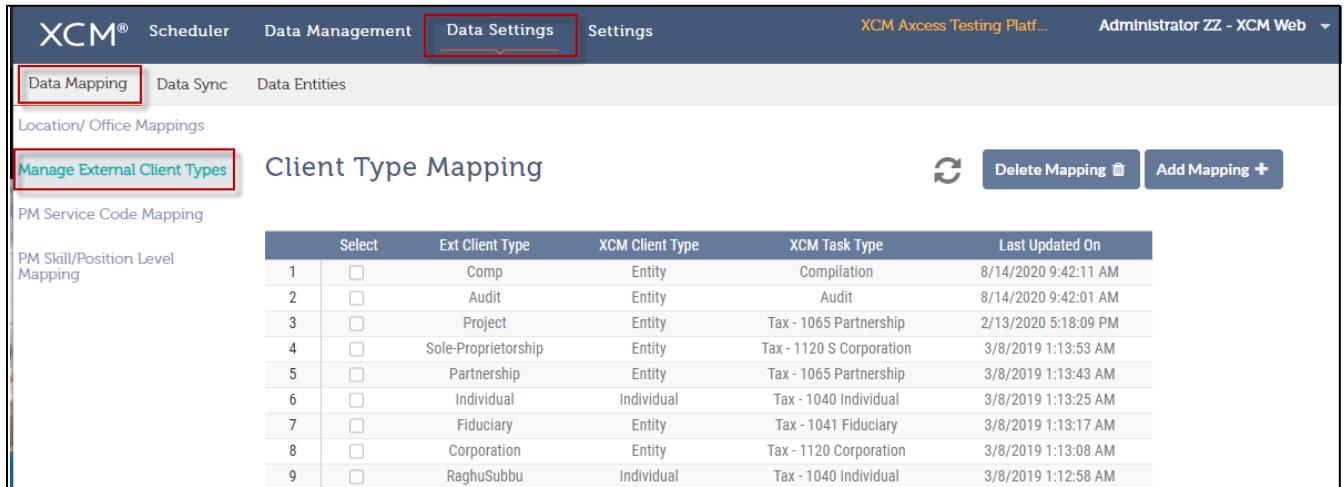
Data mapping locations links the Axxess office to the XCM location.

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Integration Utility – Mapping External Client Types

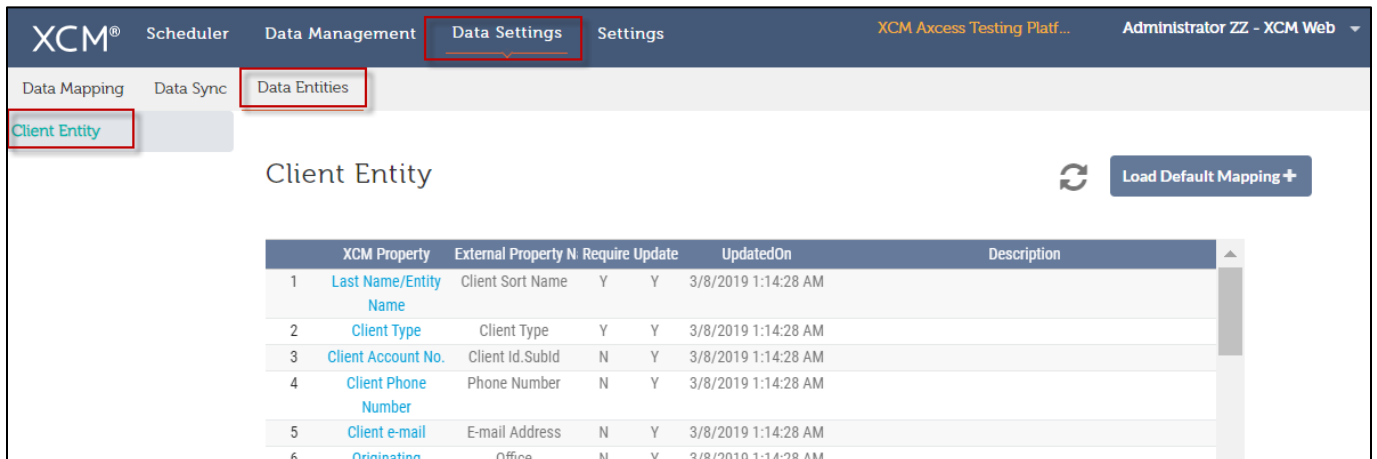


The screenshot shows the XCM® interface with the 'Data Settings' tab selected. Under 'Data Mapping', 'Manage External Client Types' is highlighted. The 'Client Type Mapping' table lists various client types and their corresponding XCM task types.

Select	Ext Client Type	XCM Client Type	XCM Task Type	Last Updated On
<input type="checkbox"/>	Comp	Entity	Compilation	8/14/2020 9:42:11 AM
<input type="checkbox"/>	Audit	Entity	Audit	8/14/2020 9:42:01 AM
<input type="checkbox"/>	Project	Entity	Tax - 1065 Partnership	2/13/2020 5:18:09 PM
<input type="checkbox"/>	Sole-Proprietorship	Entity	Tax - 1120 S Corporation	3/8/2019 1:13:53 AM
<input type="checkbox"/>	Partnership	Entity	Tax - 1065 Partnership	3/8/2019 1:13:43 AM
<input type="checkbox"/>	Individual	Individual	Tax - 1040 Individual	3/8/2019 1:13:25 AM
<input type="checkbox"/>	Fiduciary	Entity	Tax - 1041 Fiduciary	3/8/2019 1:13:17 AM
<input type="checkbox"/>	Corporation	Entity	Tax - 1120 Corporation	3/8/2019 1:13:08 AM
<input type="checkbox"/>	RaghuSubbu	Individual	Tax - 1040 Individual	3/8/2019 1:12:58 AM

Data Mapping External Client Types determines the default task type for the XCM client based upon the Access client type.

Integration Utility – Manage Client Entity



The screenshot shows the XCM® interface with the 'Data Entities' tab selected. Under 'Data Mapping', 'Client Entity' is highlighted. The 'Client Entity' table lists various client properties and their corresponding XCM task types.

XCM Property	External Property N	Require Update	UpdatedOn	Description
1 Last Name/Entity Name	Client Sort Name	Y	Y	3/8/2019 1:14:28 AM
2 Client Type	Client Type	Y	Y	3/8/2019 1:14:28 AM
3 Client Account No.	Client Id.Subid	N	Y	3/8/2019 1:14:28 AM
4 Client Phone Number	Phone Number	N	Y	3/8/2019 1:14:28 AM
5 Client e-mail	E-mail Address	N	Y	3/8/2019 1:14:28 AM
6 Origination	Office	N	Y	3/8/2019 1:14:28 AM

Data Entities mapping provides flexibility for optional fields for import such as email and phone number. It also allows the staffing mapping to be maintained to the needs of the firm.

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Integration Utility – Settings

XCM® Scheduler Data Management Data Settings **Settings** XCM Access Testing Platf... Administrator ZZ - XCM Web

App Settings

Application Name: CCH Access

Description: CCH Access - Products/Services

Version Number: 1.0.0.0

Integration Type: PM ACCESS

Integration URL: https://api.cchaccess.com/

Integration Credentials:

Account Number:

User Name:

Password: Enter Your Password

Delete License
Add License

Select	Licensing Key	Valid From	Valid Until	Status	Updated On
1		3/8/2019 12:00:00 AM	12/31/2019 12:00:00 AM	ACTIVE	3/8/2019 1:11:48 AM

CCH Request SDK License:

- Product ID: 735800
- Product Description: Workflow Integration Kit-Non-Commercial.

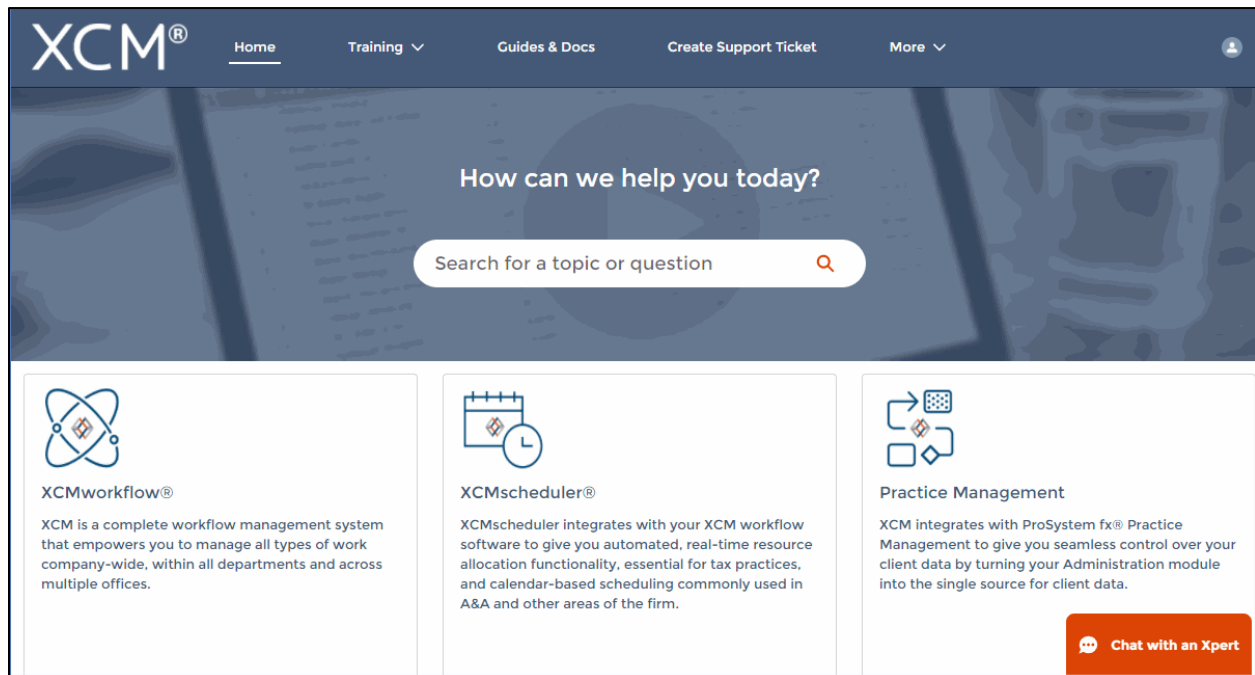
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HELP CENTER

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.

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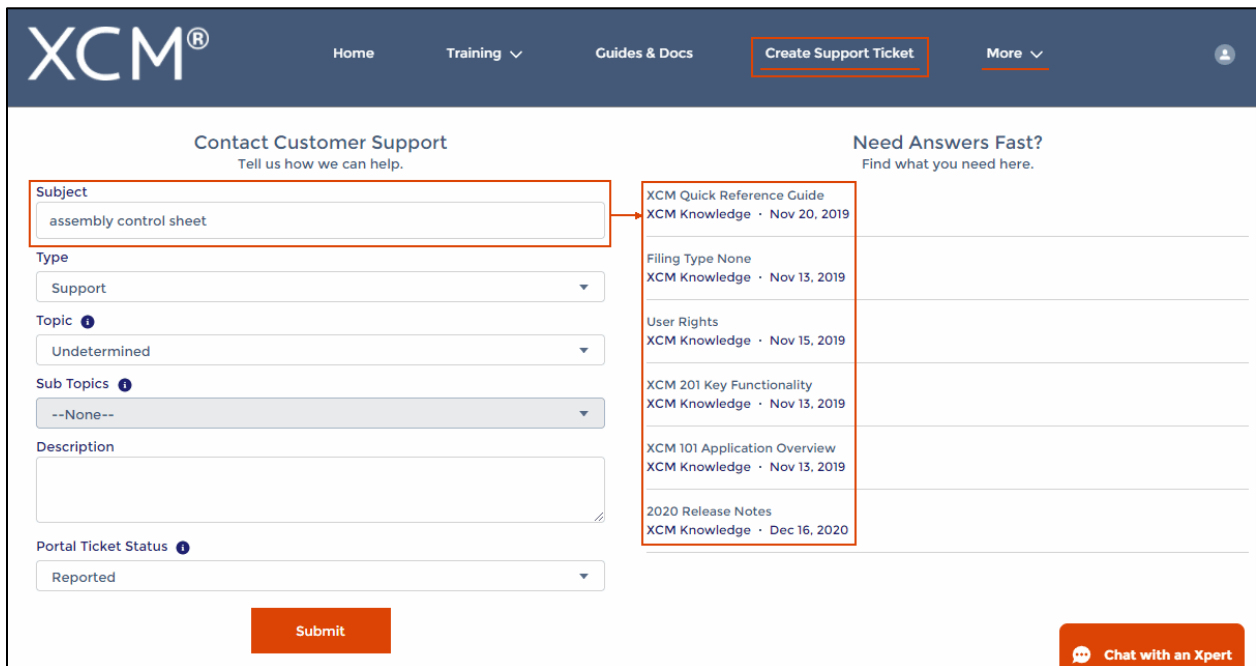
- XCM has a 95% success rate for responding to all online inquiries within 2 hours. Users are encouraged to submit a request to create a **Support Ticket** with the description and type of support required. For faster response, an online **Chat** help is available between 9 a.m. and 5 p.m. EST, Monday 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.



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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.

XCM[®]

[Home](#)
[Training](#)
[Guides & Docs](#)
[Create Support Ticket](#)

More
^

Manage Support Ticket
Contact Us

New

Tickets
Recently Viewed
▼
↑

0 items • Updated a few seconds ago

⚙️
📄
🔄
✎️
👤
🔍

Case Number	Account Name	XCM Account #	Subject	Status	Date/Time Opened	Case Owner

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