XCM®

Accelerated Workflow Automation

XCM and ProSystem fx® Practice Management Client Integration Database Mappings Guide

October 2020

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Last Updated: June 2021

Contents

CLIENT INTEGRATION MAPPINGS – OVERVIEW

This document contains information about the default database field mappings between ProSystem fx® Practice Management and XCM as they relate to the XCM Client Integration process.

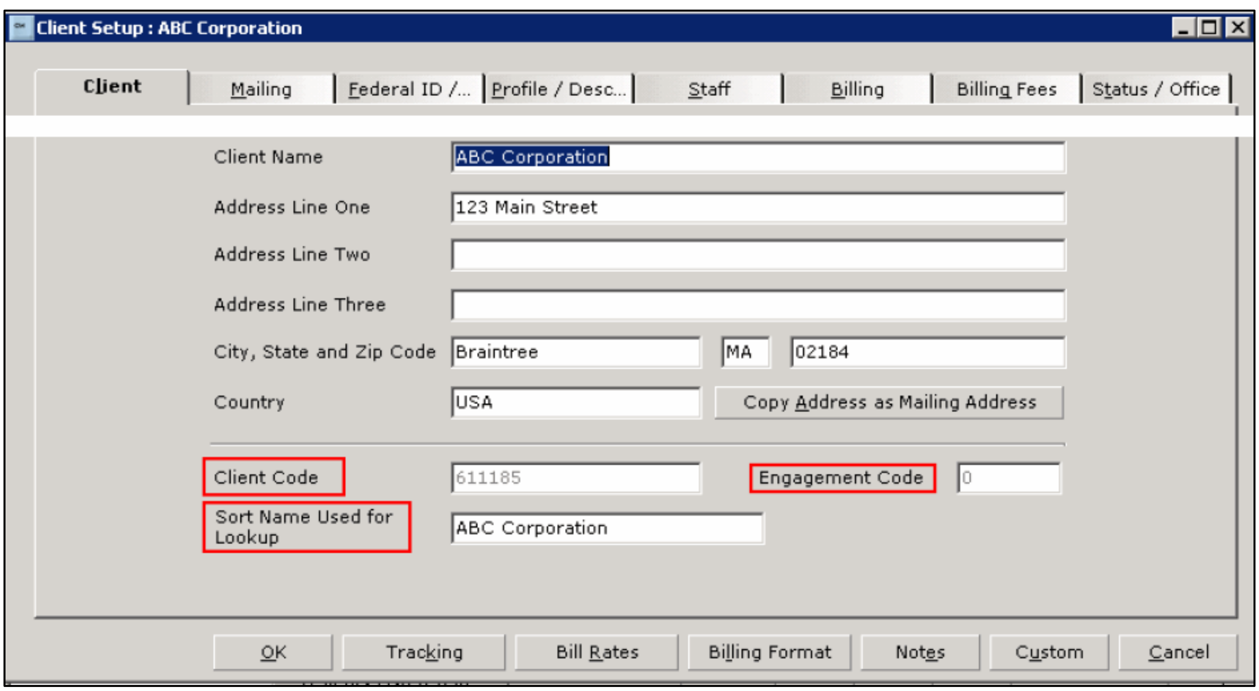
These default mappings may need to be modified during installation to accommodate each firm's use of ProSystem fx® Practice Management (PM) fields and how they should be carried over into XCM during the import of new PM clients or synchronization of existing linked clients as changes are made in PM.

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

Practice Management Fields

The following screenshots include all the PM Administration pages displaying fields that are mapped to XCM fields. Please see the spreadsheet in Section 5.0 for more details.

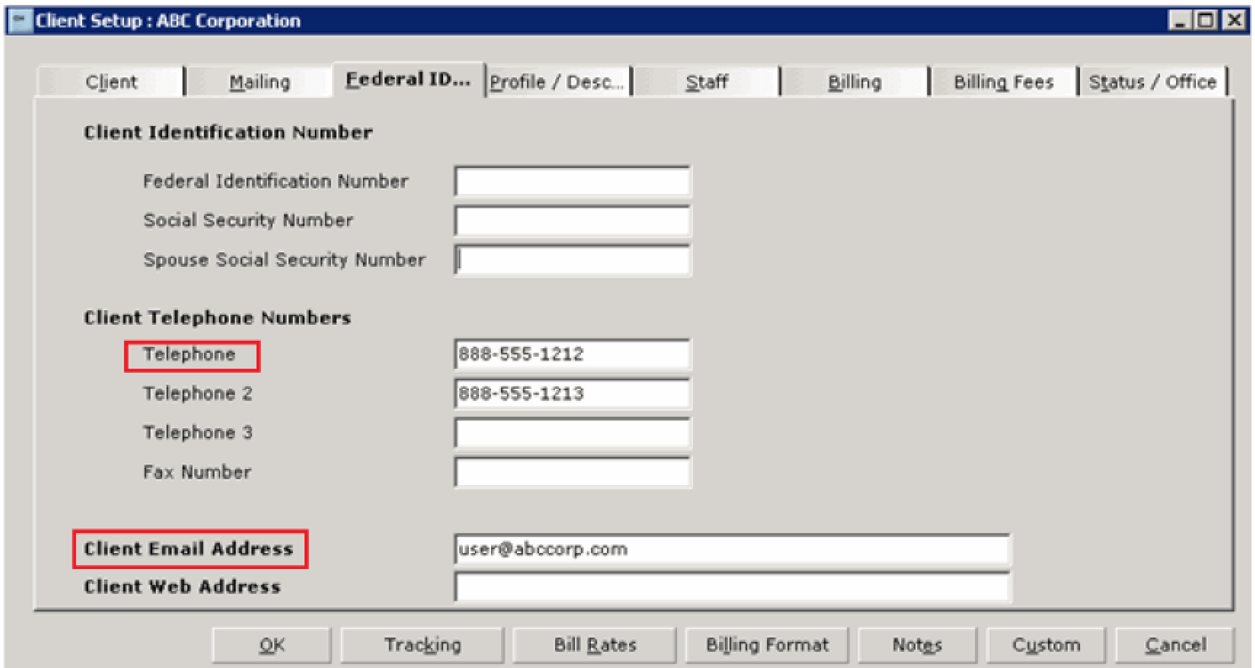
Administration –> Clients –>Client Setup –> Client Tab



There is only one field for the client name in PM. XCM uses that field for both entities (copies the fields exactly as it is in PM), and for individuals (constructs first/last names).

The XCM **Client Account Number** field is a concatenation of the PM **Client Code** and **Engagement Code** fields, separated by a period. In the case above, the XCM **Client Account Number** would be 611185.000. When XCM does its initial automatic linking between PM and XCM clients, it matches clients based solely on the **Account Number** field. As a result, if clients already exist in both PM and XCM, the better the overall match between account numbers, the more efficient and thorough the initial automatic linking will be. Importing PM clients will automatically generate the matching XCM **Client Account Number** by combining the two PM fields. For firms who do not use the PM **Engagement Code**, XCM integration can be configured to ignore it and instead just use the PM **Client Code** as the XCM **Client Account Number**.

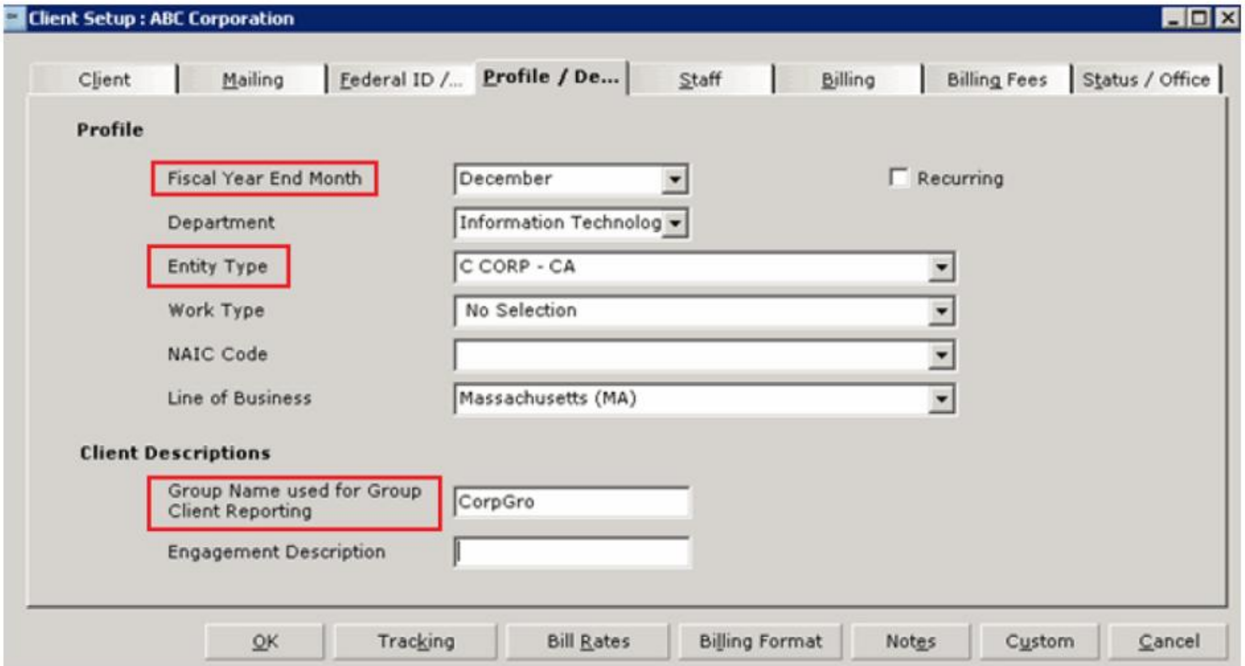
Administration -> Clients -> Client Setup -> Federal ID Tab



The first PM Telephone 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 PM **Client 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.

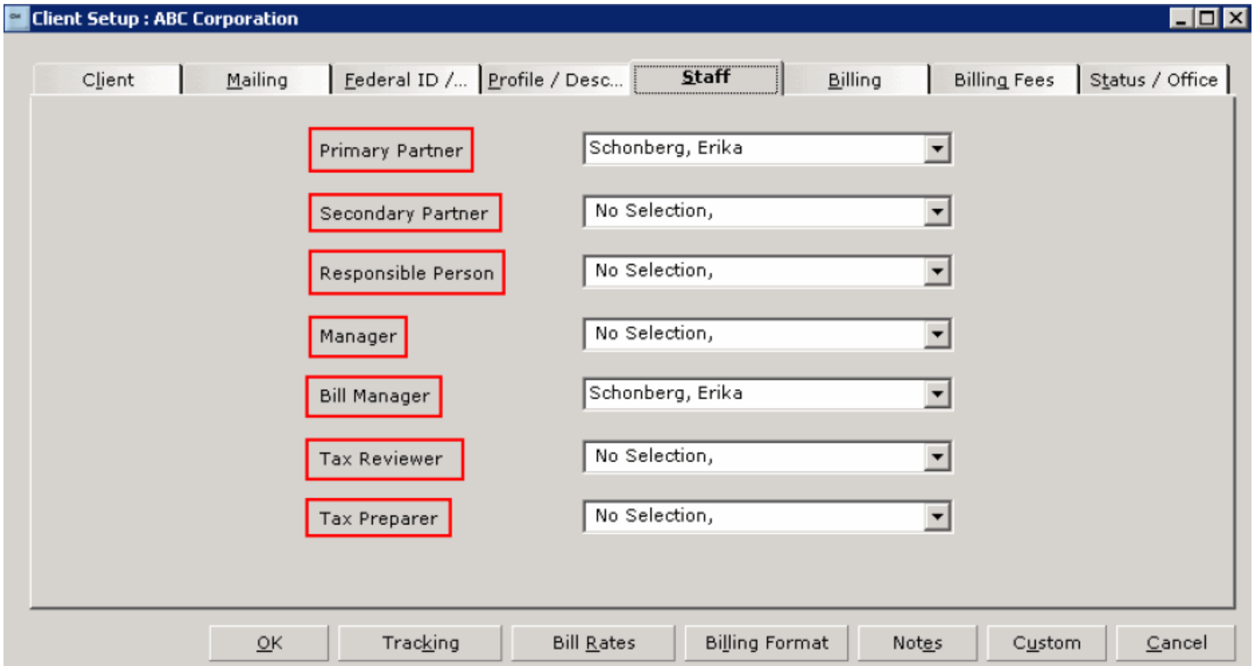
Administration –> Clients –> Client Setup –> Profile/Description Tab



The month listed in the PM **Fiscal Year End Month** field will appear in XCM as mm/dd (12/31 for December, as in the above screenshot). **Entity Type** will be logically mapped to a corresponding XCM entity type through an XCM integration utility available to the firm (see User Guide).

XCM will import and synchronize the **Group Name used for Group Client Reporting** field with the XCM client group field. Best practices suggest that creating matching groups in PM and XCM and then assigning PM 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 no group exists matching the PM group, a new group will be added to XCM and the client will be assigned to it.

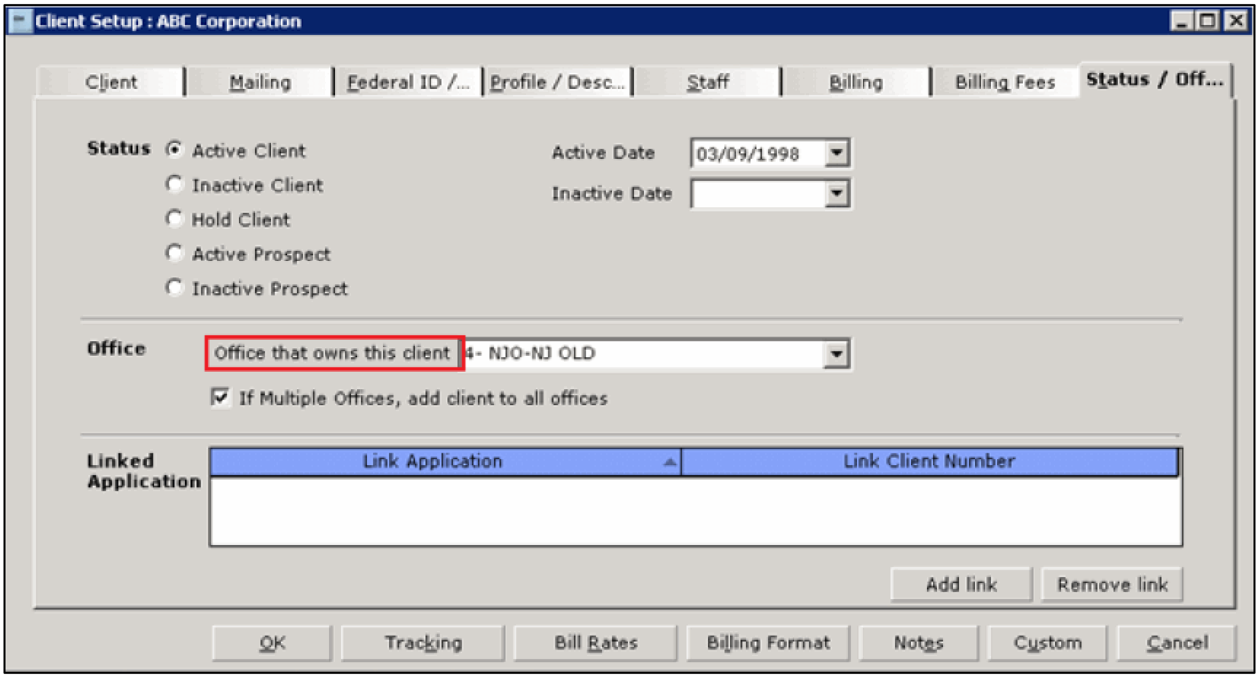
Administration –> Clients –> Client Setup –> Staff Tab



As a default, all of the above staffing assignments are mapped to XCM staffing assignments (these are the default role labels). Depending on the firm's use of each, those defaults may need to be changed during installation and/or one PM role mapped to more than one XCM role. Useful and accurate staff mappings are a critical aspect of client integration because they directly affect workflow.

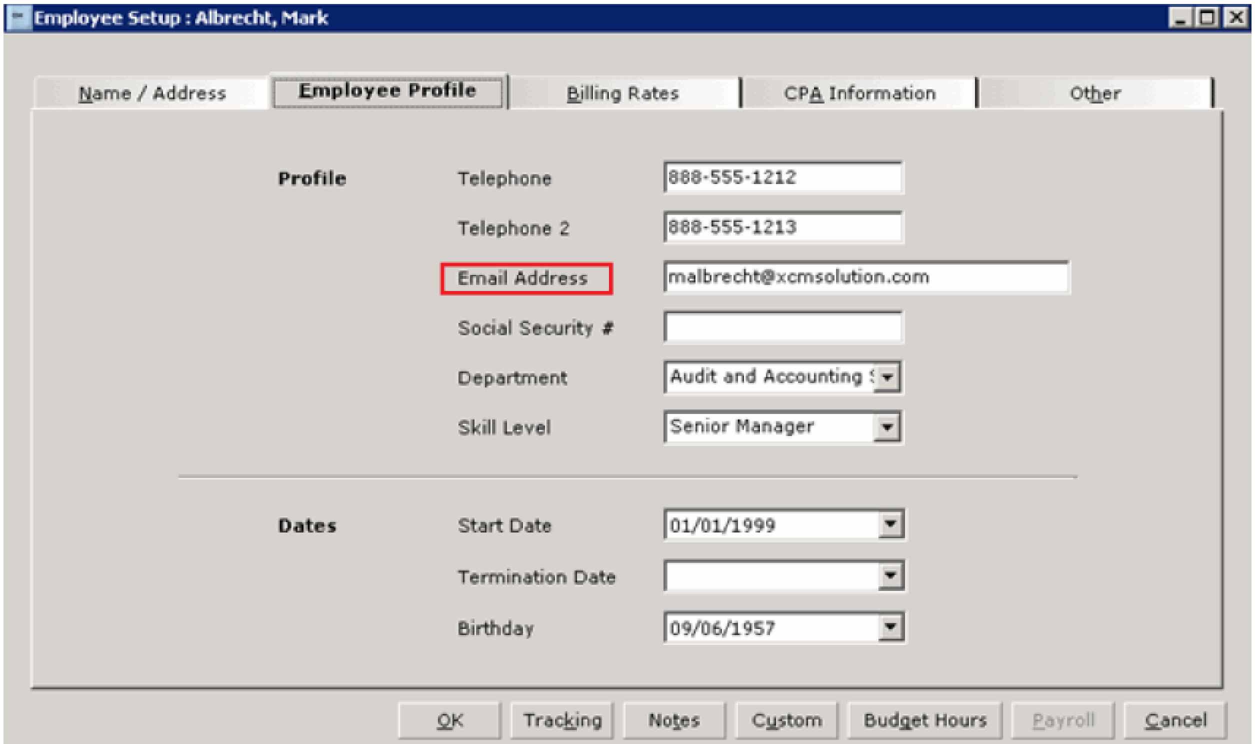
The XCM **Responsible Person** role is required in XCM and affects workflow processes, so to optimize new client imports and synchronization it is important to map a valid and always populated PM staffing assignment to the XCM **Responsible Person**. Since both applications allow labeling of staffing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

Administration –> Clients –> Client Setup –> Status/Office Tab



The PM Office that owns this client field is mapped to a corresponding XCM **Originating Location** through an XCM integration utility available to the firm (see PM User Guide). Every PM client must have an office selected (for mapping to work correctly, **No Selection** is not an option).

Administration –> Clients –> Client Setup –> Employee Profile Tab



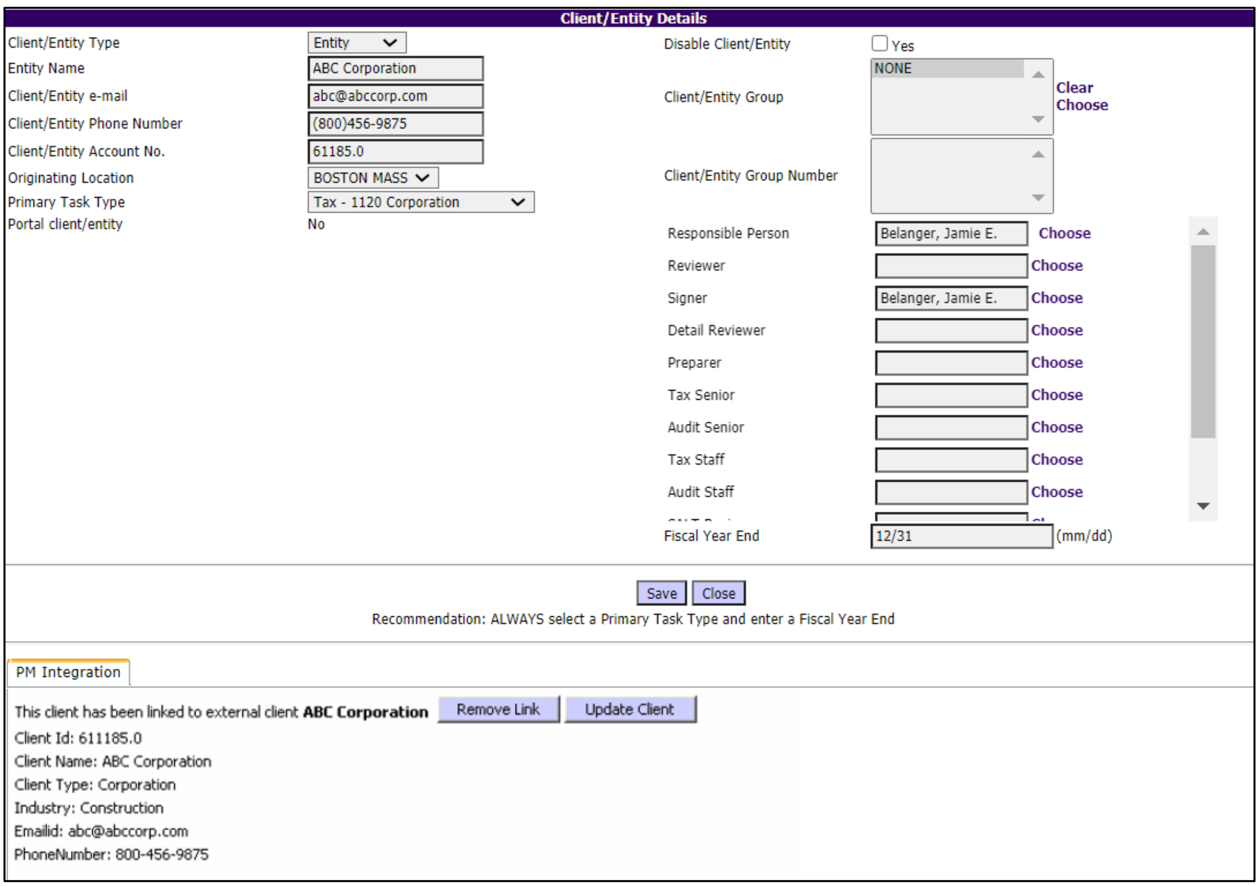
XCM looks up the employee's email address from the PM **Email Address** field when matching staff assignments. It must exactly match the user's login email address in XCM or user role mapping synchronization will not work.

XCM Client Details Page for Entities

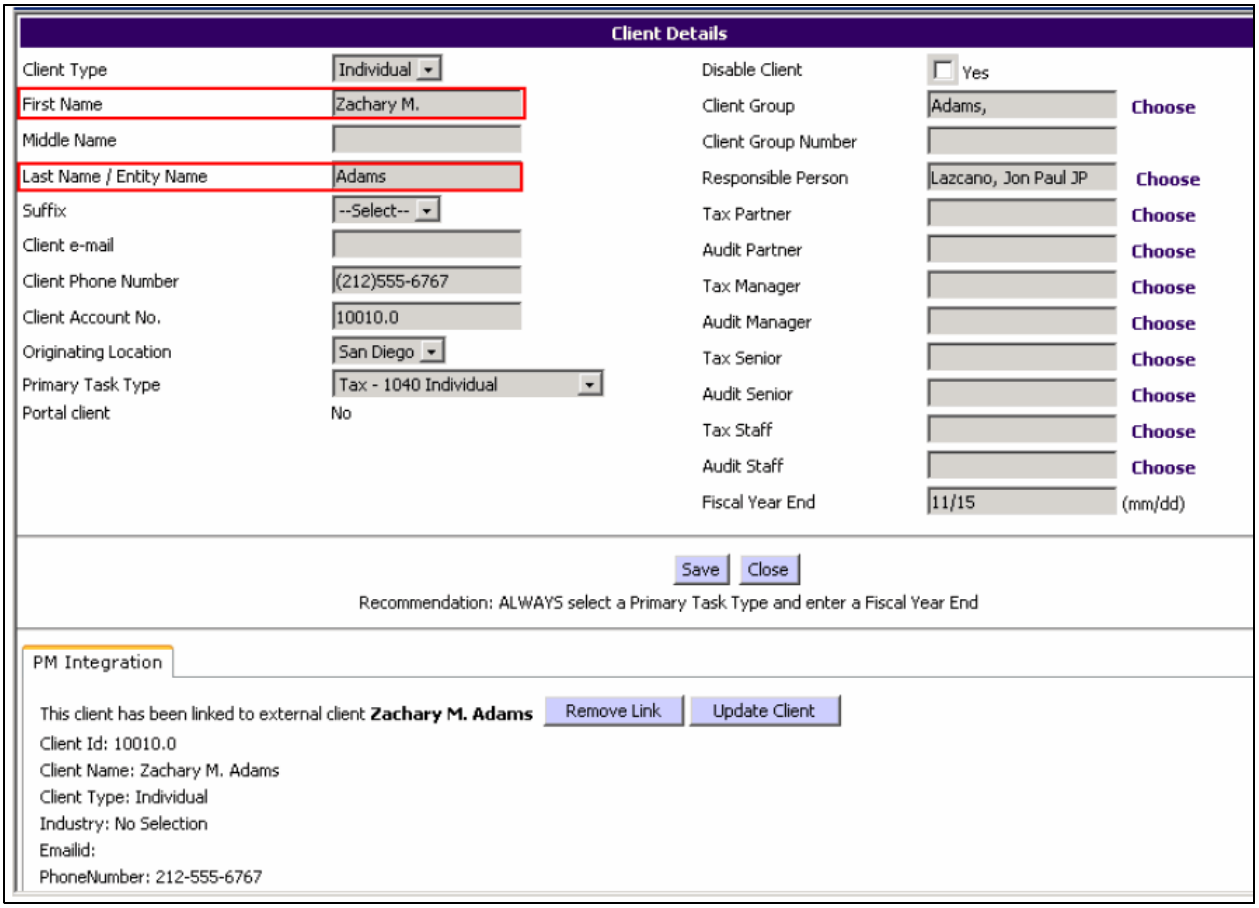
Client Integration synchronizes the above PM fields with XCM fields that appear within the top portion of the XCM Client Details screen and updates the XCM data with changes to PM data through synchronization jobs (see User Guide).

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

XCM Client/Entity Details



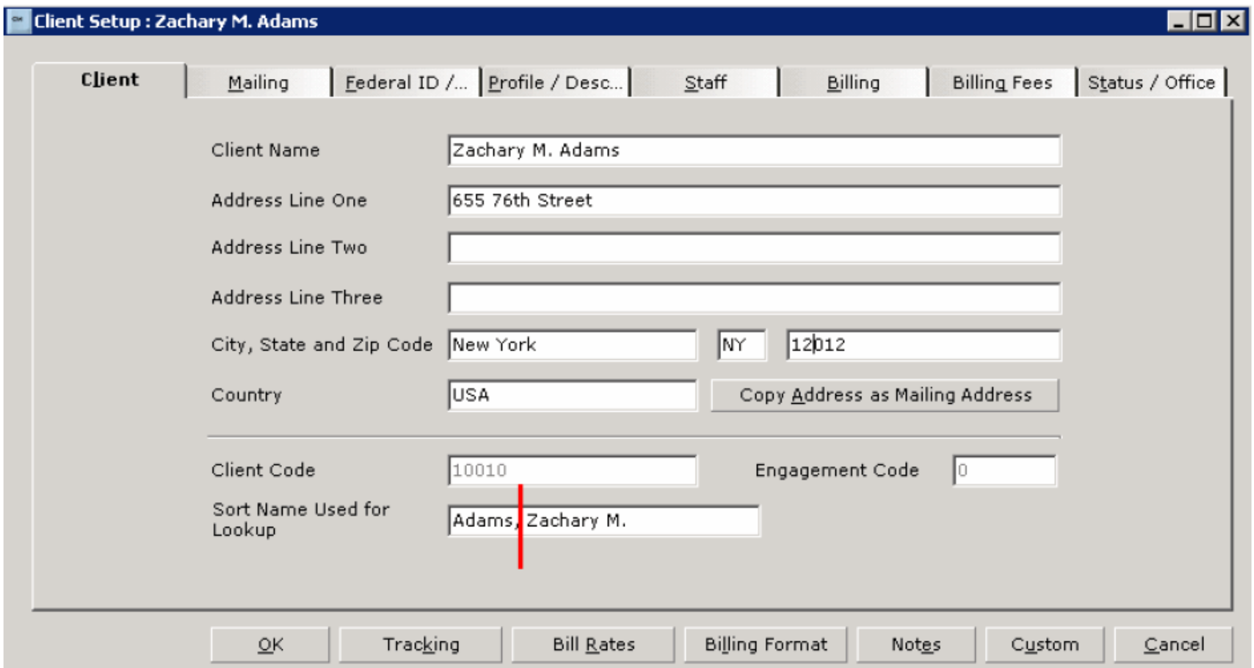
XCM Client Details



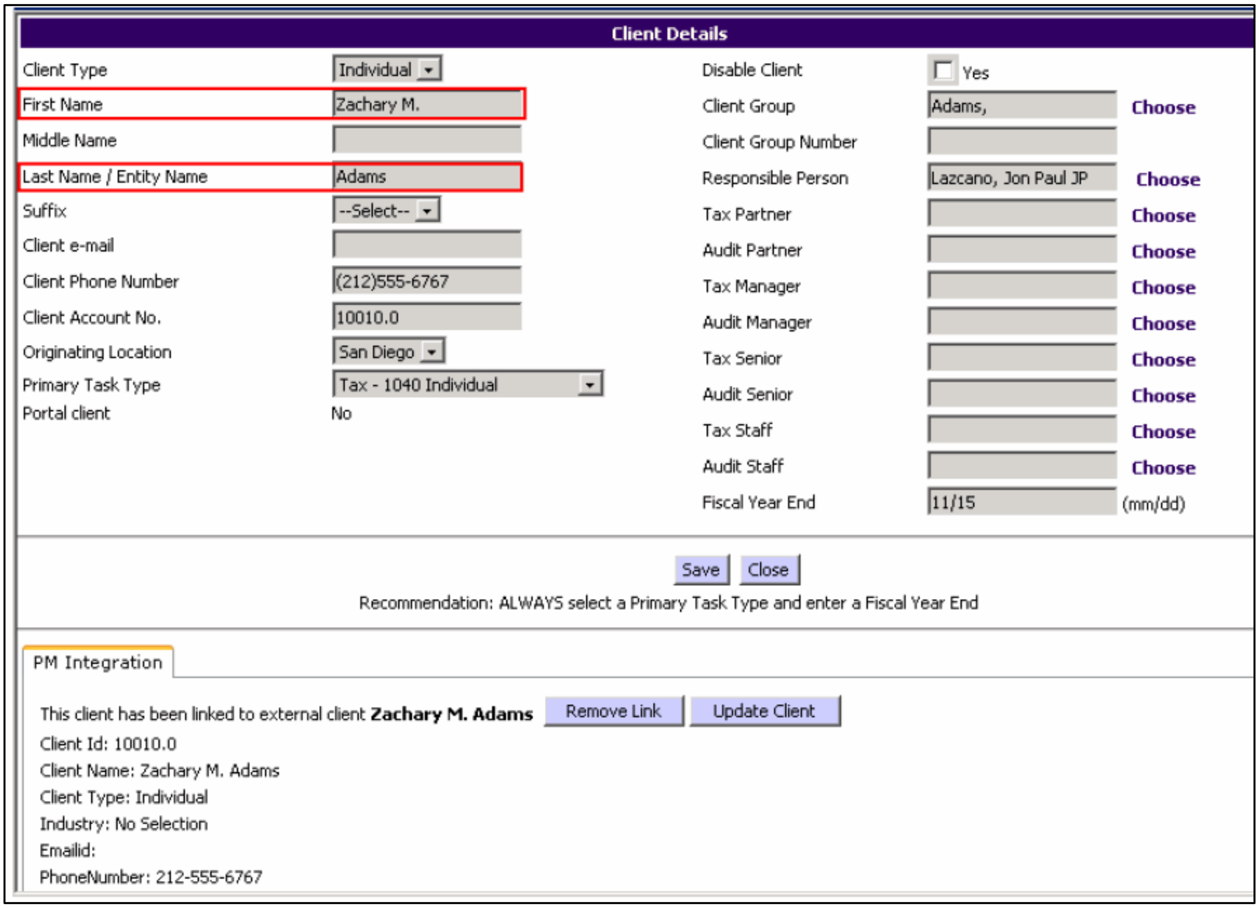
XCM Treatment of Individual Client Type Names

Because there is only one field for the client name in PM, for individuals XCM parses the PM **Sort Name Used for Lookup** field to create a first and last name. Since this field is typically configured to allow PM users to quickly look up an Individual Entity client by 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**.

Client Setup



Client Details



View Client Details Mapping Utility

The XCM integration utility **View Client Detail Mappings** displays the current mappings between the PM and XCM database fields.

Mapping between PM and XCM database fields

MappingI	XCM Name	XCM Data Field	External Data Field
1	First Name	first_name	
2	Middle Name	middle_name	
3	Last Name/Entity Name	last_corporate_name	cltsort
4	Suffix	generation_type	
5	Client Type	clienttype_id	engentity
6	Client Phone Number	phone_number	cltphone
7	Client e-mail	email_id	cltemail
8	Client Account No.	account_number	cltnum
9	Audit Partner	auditpartner_id	crpnum
10	Tax Partner	taxpartner_id	cspnum
11	Tax Manager	manager_id	cmgnum
12	Responsible Person	cparesponsible_id	cppnum
13	Audit Staff	auditstaff_id	
14	Tax Staff	taxstaff_id	
15	Originating Location	originating_location	cltoff
16	Primary Task Type	primary_task	engwork
17	Fiscal Year End	periodend_date	engfye
18		is_client_guid	id
19	Client Account No.	is_client_id	cltnum
20		is_client_name	cltname
21		is_client_orgcode	
22		is_client_officeid	cltoff
23		is_client_type	engentity
24		is_client_industry	englob
25		is_client_address	engaddr1
26		is_client_city	engcity
27		is_client_state	engst
28		is_client_country	engcountry
29		is_client_zip	engzip
30	Audit Manager	auditmanger_id	cbmnum
31		is_client_emailid	cltemail
32		is_client_phonenumber	cltphone
33		account_number_append	clteng
34	Client Group	clientgroup_name	engrelated
35	Tax Senior	taxsenior_id	ctrnum
36	Audit Senior	auditsenior_id	ctpnum

PM and XCM Field Mapping Details

The following spreadsheet provides detailed information about what default fields are mapped from Practice Management to XCM.

XCM Fields Created During Import Or Modified During Client Synchronization (top portion of XCM Client Details screen)

PM Client Tab	PM Display Name	XCM Display Name	Formatting	PM Table Name	PM Column Name
Profile/Description	Entity Type	Client Type	Mapped through XCM integration utility	clients	engentity
Client	Client Name	First Name Middle Name Last Name/Entity Name Suffix	Exact copy for Entities, derives First and Last names for individuals based on delimiters.	clients	cltname
Federal ID	Client Email Address	Client e-mail	Copied, must conform to email formatting	clients	cltemail
Federal ID	Telephone	Client Phone Number	Copied, subject to XCM phone number formatting	clients	cltphone
Client	Client Code	Client Account No.	Concatenates Client Code and Engagement Code PM fields putting a period between them	clients	cltnum
	Engagement code			clients	clteng
Status/Office	Office that owns this client	Originating Location	Matched to PM office through XCM integration mapping utility	clients	cltoff

PM Client Tab	PM Display Name	XCM Display Name	Formatting	PM Table Name	PM Column Name
Profile/Description	Entity Type	Primary Task Type	Mapped through XCM integration utility	clients	engwork
Profile/Description	Group Name used for Group Client Reporting	Client Group	Matches with exact group name or creates new XCM group	clients	engrelated
Staff	Primary Partner	Responsible Person	Matches XCM firm user's login email address to listed PM employee's email address	employee + clients	cppnum
Staff	Secondary Partner	Tax Partner	Matches XCM firm user's login email address to listed PM employee's email address	employee + clients	cspnum
Staff	Responsible Person	Audit Partner	Matches XCM firm user's login email address to listed PM employee's email address	employee + clients	crpnum
Staff	Manager	Tax Manager	Matches XCM firm user's login email address to listed PM employee's email address	employee + clients	cmgnum
Staff	Bill Manager	Audit Manager	Matches XCM firm user's login email address to listed PM employee's email address	employee + clients	cbmnum

PM Client Tab	PM Display Name	XCM Display Name	Formatting	PM Table Name	PM Column Name
Staff	Tax Reviewer	Tax Senior	Matches XCM firm user's login email address to listed PM employee's email address	employee + clients	ctrnum
Staff	Tax Preparer	Audit Senior	Matches XCM firm user's login email address to listed PM employee's email address	employee + clients	ctpnum
Profile/Description	Fiscal Year End Month	Fiscal Year End	Defaults to last day of month listed in PM	clients	engfye

PM and XCM Field Mapping Details

Prior to the implementation of the PM client integration feature, which PM user role maps to which XCM user role, needs to be configured. A spreadsheet in the following format is attached to this PDF to help in making that decision. Please fill it out and return it to XCM solutions.

PM User Role Labels	PM Default User Role Names	Maps to XCM Role	XCM Firm User Role Labels
	Primary Partner (cppnum)		
	Secondary Partner (cspnum)		
	Responsible Person (crpnum)		
	Manager (cmgnum)		
	Bill Manager (cbmnum)		
	Tax Reviewer (ctrnum)		
	Tax Preparer (ctpnum)		
If you have modified the default Practice Management user role names, you can type in the altered names here for reference	These are the default role labels. However, the order from top to bottom is the same as it appears on the PM Administration Client, no matter what labels are being used. Note: the two blank lines allow you to type in any of the seven roles again to map to another XCM user role.	Next to each listed 2nd column PM role, click on the blank cell above and select which XCM user role you want it to map to. During import of new clients, and synchronization of existing linked clients, the PM role selected will update the XCM role in Client Details.	If you have modified the default role names, you can type in the altered names here for reference.

You may have a single PM role map to multiple XCM user roles, and may also have a PM role not map to any XCM user roles. Because, each application allows for custom labeling of user roles, the role labels listed are the default labels and your labels may be different. The initial default mapping is straight across, first entry to first entry, second entry to second entry, and so on. Since XCM provides nine user roles and PM only seven, by default the last two XCM user roles, Tax Staff and Audit Staff, have no corresponding PM mapping. See the example mapping below.

When PM clients are imported and/or synchronized, the corresponding user roles are updated according to this mapping configuration.

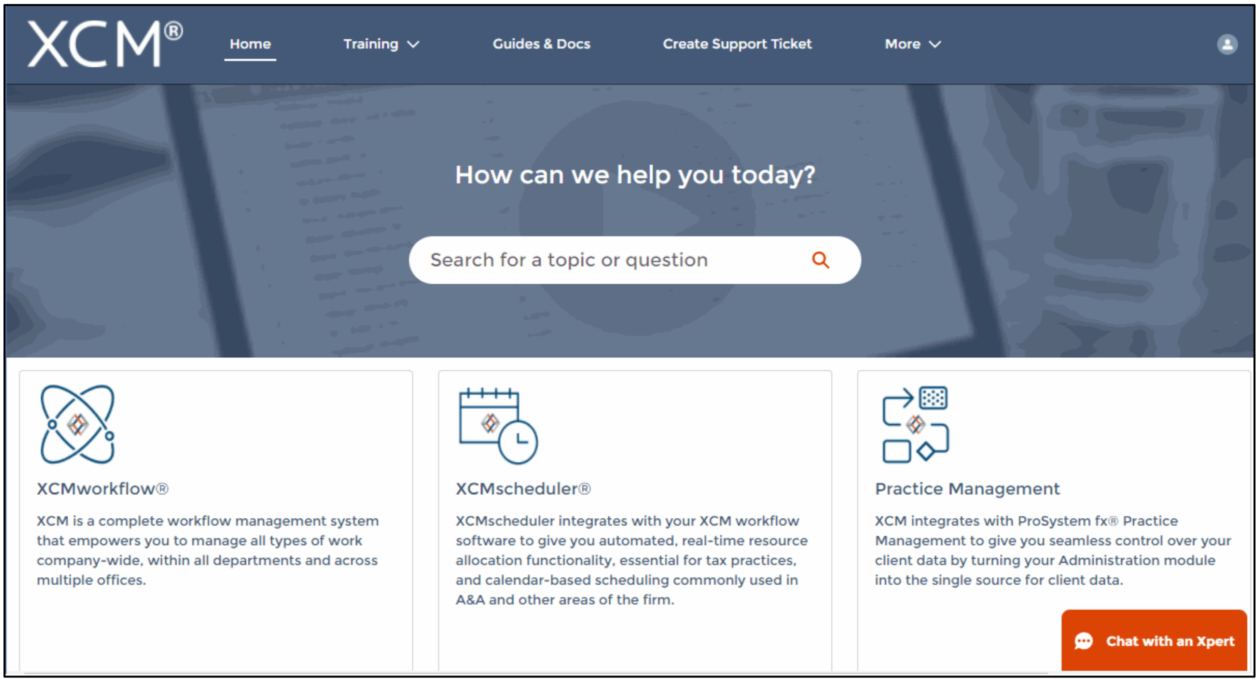
Example: The firm has relabeled some of the PM roles, and always assigns a Client Admin to each client. They have decided to map the PM Client Admin role to the XCM Responsible Person role, and re-label the XCM roles to match the PM role labels. They are also matching the Client Admin role to a second XCM role.

PM User Role Labels	PM Default User Role Names	Maps to XCM Role	XCM Firm User Role Labels
Main Partner	Primary Partner (cppnum)	Tax Partner	Main Partner
	Secondary Partner (cspnum)		
Client Admin	Responsible Person (crpnum)	Responsible Person	Client Admin
	Manager (cmgnum)		
Billing Supervisor	Bill Manager (cbmnum)	Audit Partner	Billing Supervisor
Primary Review	Tax Reviewer (ctrnum)	Tax Manager	Primary Review
	Tax Preparer (ctpnum)		
Client Admin	Responsible Person (crpnum)	Audit Staff	Secondary Review

If you have any questions or need support, please email us at support@xcmsolutions.com

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.

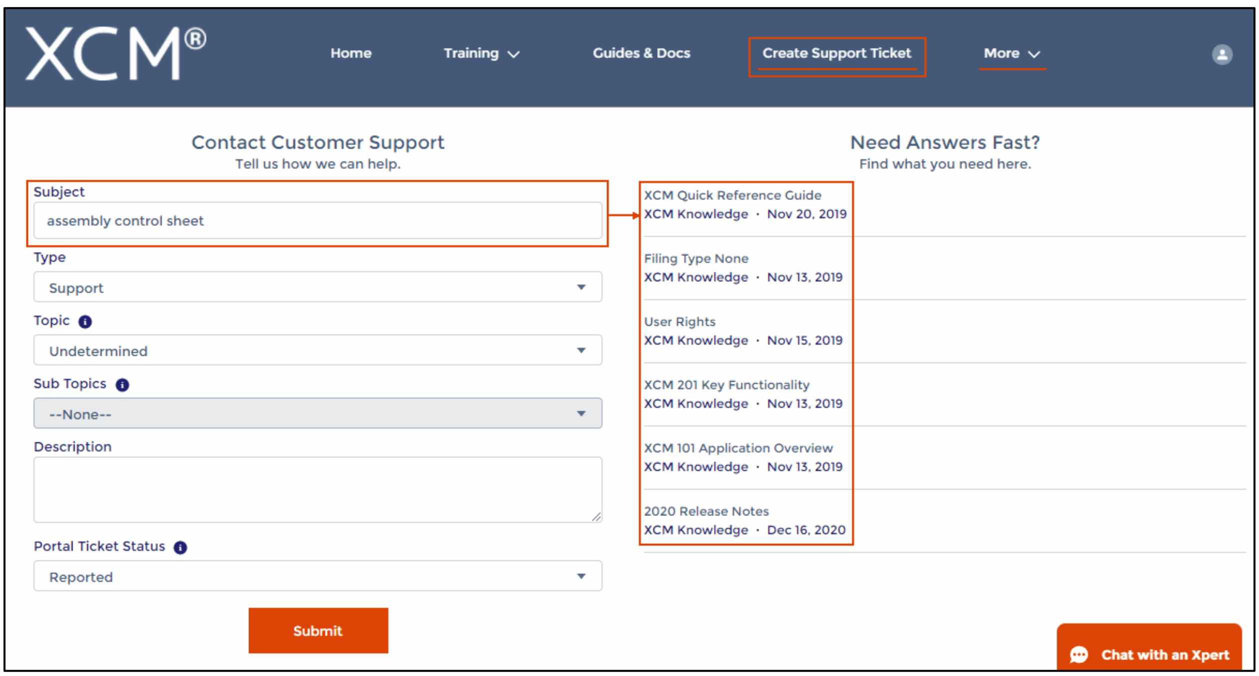
- XCM has a 95% success rate for responding to all online inquiries within 2 hours. Users are encouraged to submit a request to create a **Support Ticket** with the description and type of support required. For faster response, an online **Chat** help is available between 9 a.m. and 5 p.m. EST, Monday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

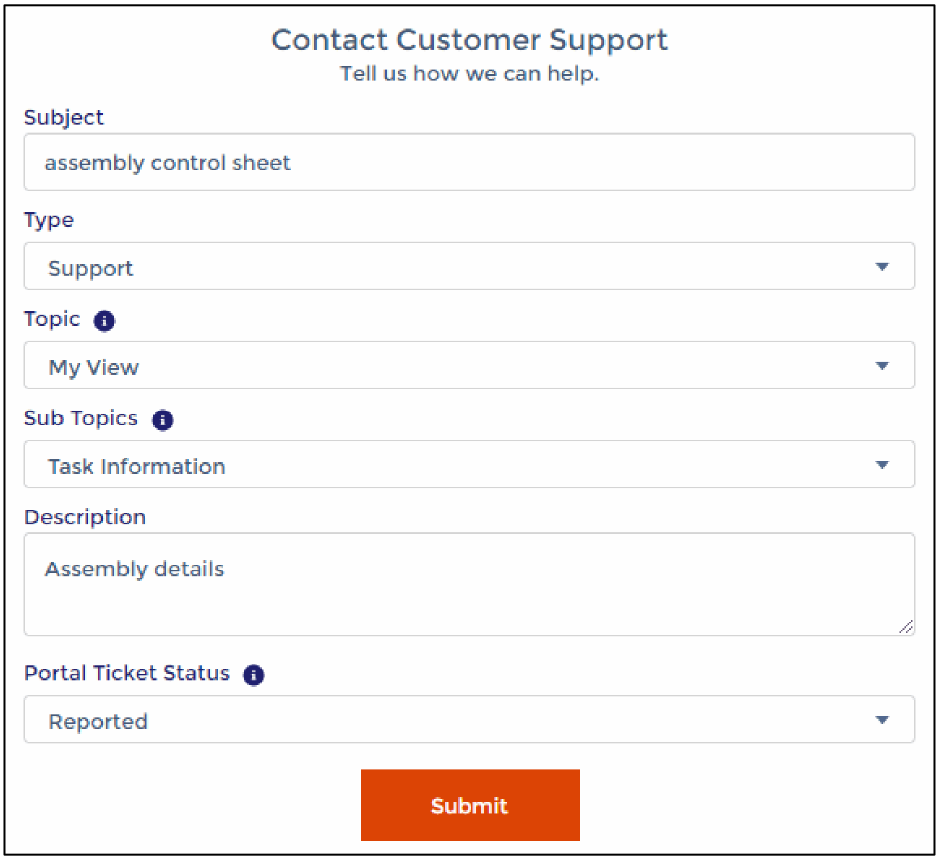
1. **Preliminary assistance through Self Help Docs**

   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.



2. Create a Support Ticket

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



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