

XCMapi Overview

XCM® Solutions provides a diverse set of REST APIs for organizations that use XCMworkflow®. This set of APIs is termed XCMapi. The APIs help to import information into, and export information out of, XCMworkflow.

How APIs are Used

APIs can be used to add or update Client, Firm, Task, and User information in the workflow. Currently available APIs are grouped into five categories. The APIs under each category and a brief description are detailed in the Appendix.

Organizations that Would Benefit from XCMapi

XCMapi helps organizations connect XCMworkflow with other programs that leverage client, entity, task, employee, scheduling, or time information. This helps users better scale their businesses by providing more detailed data to better assess company and individual performance, bottlenecks, and inefficiencies. This allows users to easily compare data across management systems for a more holistic view of project statuses and business progress.

Organizations that (1) have their own development teams and (2) have a sophisticated set of applications are ideal candidates for XCMapi.

Prerequisites/Security

A valid login and API key are required to authenticate an XCMapi user. These credentials will be provided by the XCM® Integration team. Subsequent calls would use the API key and the token that are returned from the authentication call.

XCMapi Types

There are two primary types of APIs: POST and GET.

- POST APIs enable information to be updated (or searched) within XCMworkflow.
- GET APIs enable information to be retrieved from XCMworkflow.

Data in either case can be information that is maintained within other applications or databases.

XCMapi Export and Import

XCMapi can only retrieve and update information within XCMworkflow. It cannot pull (retrieve) or update (push) information to other applications. Such pull and push operations require the APIs of the respective applications.

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Last Updated: June 2021

For more information on XCMapi

Contact your Account Manager or your Customer Service Representative/Consultant for more information. Fill out the form at <https://www.xcmsolutions.com/Contact-Us> if you don't know who to contact. You can also send an email to support@xcmsolutions.com to discuss your requirements as needed.

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APPENDIX—LIST OF APIs BY CATEGORY

Count	API Function	API Description	Method
Category: Auth			
1	User	API that provides the authentication token that will be used by all the other APIs to authenticate the API call	POST
Category: Client			
2	Create	API to create Client	POST
3	Update	API to update Client Details	POST
4	Bulk Update	API to update a large number of Client records at once	POST
5	Search	API to search for Client with Basic Parameters (First Name, Last Name, Account Number, Type, Email)	POST
6	Advance	API to do an Advanced Search for Client with option to create combination search filters	POST
7	Client	API to get Client Details using Client Internal ID	GET
Category: Firm			
8	Firm	API to get firm details—firm identity is determined from API key	GET
9	Branch	API to get firm branch details—firm identity is determined from API key	GET
10	Category	API to get firm Category	GET
11	Generation Types	API to get firm Client Generation Types	GET
12	Task Type	API to get firm specific Task Types	GET
13	Roles	API to fetch firm Roles	GET
14	Client Type	API to get firm Client Types	GET
Category: Task			
15	Create	API to Create Task	POST
16	Update	API to Update Task	POST

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Count	API Function	API Description	Method
17	Deliverable/Create	API to Add Deliverable for existing Task	POST
18	Document/Link	API to link document for existing Task	POST
19	Budget Time/ Update	API to update the budgeted time for an existing Task	POST
20	Actual Time/Update	API to do update the actual time for an existing Task	POST
21	Search	API to search for a Task with basic Client and Task information	POST
22	Search/Advanced	API to perform and advanced search on a Task with multiple filters and combinations	POST
23	Task	API to fetch Task details using the Internal Task ID	GET
24	Task/Status List	API to fetch status details on Task movement	GET
25	Task/Checklist	API to fetch checklist details for a particular Task using the Internal Task ID from Task checklist	GET
26	Task/ Issue Points	API to fetch issues and points for a particular Task using the Internal Task ID	GET
27	Task/Deliverables	API to fetch Task deliverables for a particular Task using the Internal Task ID	GET
28	Task/Assembly	API to fetch Task assembly details for a particular Task using the Internal Task ID	GET
29	Task/Shipping	API to fetch Task shipping details for a particular Task using the Internal Task ID	GET
30	Task/Document Link	API to fetch a list of linked documents	GET
Category: User			
31	Create	API to create user	POST
32	Update	API to update user details	POST
33	User/ User Internal ID	API to get user details using internal user id	GET
34	Search	API to search for users using basic search parameters	POST

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Count	API Function	API Description	Method
35	Advanced	API to perform advanced search for users using filters and combinations of filters	POST
36	User By Email	API to get user details using email id of user	GET

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

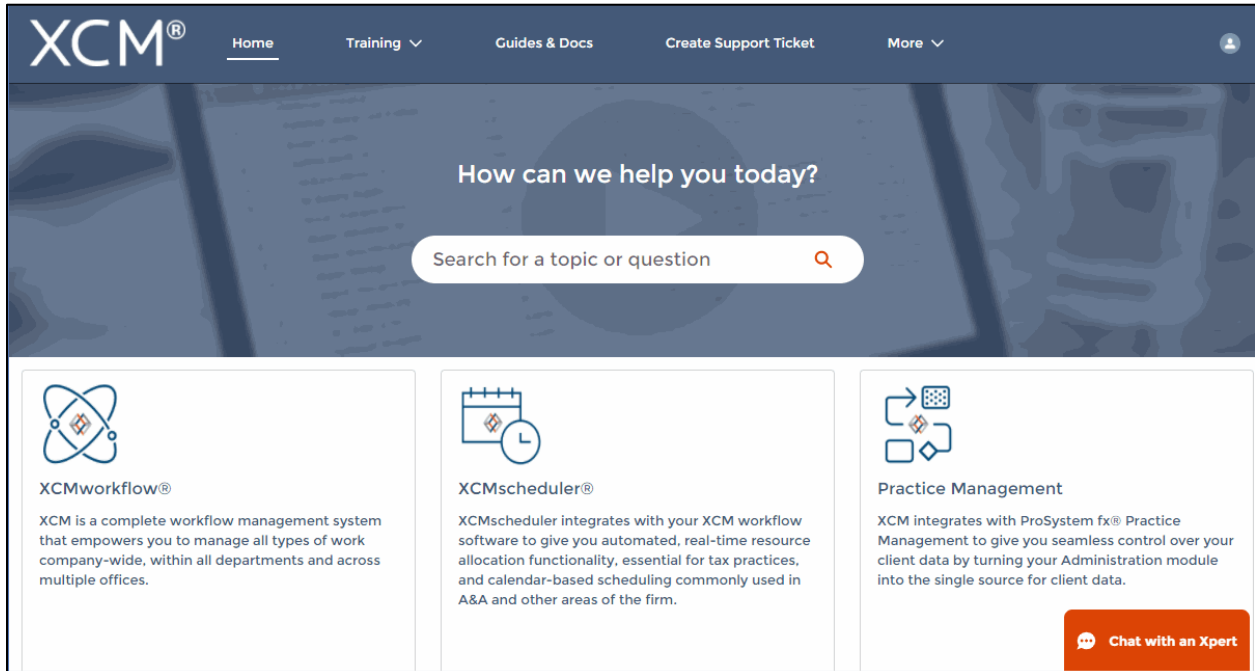
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HELP CENTER

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.



XCM® Home Training ▾ Guides & Docs Create Support Ticket More ▾

How can we help you today?

Search for a topic or question 🔍

XCMworkflow®

XCM is a complete workflow management system that empowers you to manage all types of work company-wide, within all departments and across multiple offices.

XCMscheduler®

XCMscheduler integrates with your XCM workflow software to give you automated, real-time resource allocation functionality, essential for tax practices, and calendar-based scheduling commonly used in A&A and other areas of the firm.

Practice Management

XCM integrates with ProSystem fx® Practice Management to give you seamless control over your client data by turning your Administration module into the single source for client data.

[Chat with an Xpert](#)

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

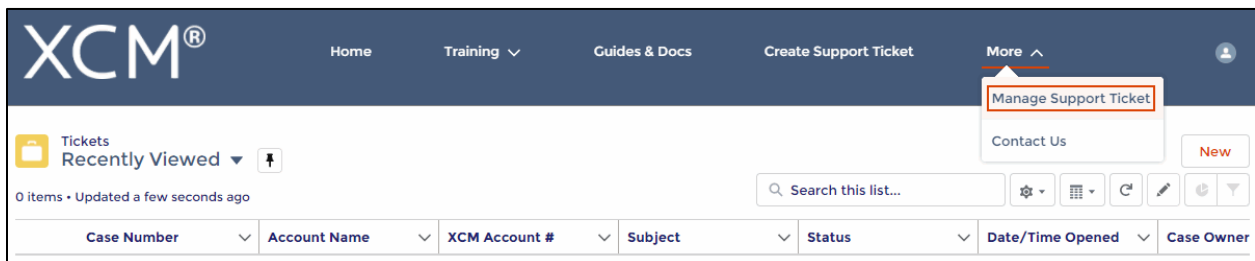
Topic ⓘ

Sub Topics ⓘ

Description

Portal Ticket Status ⓘ

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



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