The questions below will help test your knowledge of the **XCM Tasks** capabilities and functionality.

1. **How can I make “Courier” as the default shipping method in XCM?**

   Please follow the below steps to make the Courier as default Shipping Method:
   - Go to Manage Settings and Defaults utility
   - Choose “Courier” under Shipping drop down in Default Settings
   - Click on “Save Default Settings” button
   - Logout and login once to view the changes

   Note: “Manage Settings and Defaults” user right required to access the utility to change the Default Settings

2. **What is the Difference between Rollover and Recurring?**

Auto Rollover (If turned on)	Recurring (If setup)
The Rollover setup can be turned on for a Task Type under “Manage Task Types” utility and the setup is applicable for all the tasks of the Task Type	The Recurring can only setup for a specific task to recur in “Manage Recurring Tasks” utility
The tasks will rollover to next period end only when the current period end tasks moved to Completed, Filing Not Required and Processing Not Required statuses	The tasks will recur on the day it is set to recur (number of days before or after the next Period End Date) irrespective of statuses
The Rollover tasks cannot be pushed to a specific person/ staff when the task rolls	The Recurring can be pushed to a Staff on the setup day to user’s My View page
Cannot setup the date when to start Rollover	Can setup the date when the recurrence should start

   Note: Not advisable to set both Recurring and Rollover for same Task Type

3. **What is the purpose of the “Do Not Rollover” button on the Task Page?**

   It will prevent the task from rolling over to next period end either rollover through automatically or manually.

4. **How do I permanently delete a Checklist item from a task?**

   There is currently no option to delete a Checklist item from a task permanently.

5. **Does the “last change date” change when checklist items are updated?**

   No, it won’t update the Last Change Date. The Last Change Date will update only when the task is moved to another status or if any information updated/ changed in Task General Info and Staffing sections.

6. **How do I re-open the mistakenly closed task?**

   The task can be moved to required open/ active status using Move Task button on the Task Routing Sheet. Also, the Shipping History can be deleted by selecting the required Deliverable under Shipping section and click on Clear History button if the Deliverable/ return need to re process.

7. **What is DCN in Extension?**

   Document Control Number (DCN) field is used to record the DCN if available.

8. **Why do we have sign off discrepancies in the same tasks type?**

   - (E.g. we have tasks in which the sign offs differ on tasks that are all of the same task type. We are not sure how this occurred/what we are doing wrong to cause this to happen. All of these tasks were created in bulk)

   If the SignOffs are modified/ changed in “Manage/ Customize SignOffs” utility, the changes will only apply to the newly created tasks and the changes will not be applied on existing tasks. To apply the changes on existing tasks, the “Apply to All Active Tasks” button should be clicked under the “Manage/ Customize SignOffs” utility.

9. **What are the steps for E-file process and to complete a task?**

   To move the task to eFile process, the Filing Type of the Deliverable must be eFile.

   1. So, when the Date Delivered filed updated under the Shipping section, the task will move to eFile process and the initial status of the eFile process is eFile-Awaiting Taxpayer Consent Form.
   2. When the Consent Rec’d On entered under the eFile section, the task will move to eFile To Be Transmitted status
   3. When the eFile Accepted or Rejected date and eFile On date updated, the task will move to “eFile-Awaiting Government Acceptance” status.
   4. Now, you can either click on Move To Completed button under the eFile/ Shipping sections to complete the task or move the task to Completed status using Move Task option

10. **Is there a way to change a task back to the No Info In status?**

    The 'No Info In' is the initial Status of a task where it will not have any information in it. If the task is moved out of the No Info In Status, the task will be considered as In Process and there is no possibility of moving the task back to No Info In Status.

    The only way is to delete and create a brand new task. Otherwise the task can be moved to "Unassigned" status and then move it back to the required status at the proper time as a workaround.

11. I**f we change the Period End Date of the task, will it affect the History of the task?**

    Changing Period End Date will lose all the Deliverables (Jurisdictions), Sign Offs, and Checklists associated with the task. It can be changed only when the Task information are not required.
    Note: It will not clear the History (Details Section) of the task

12. **How can I undelete a Deliverable?**

    The soft deleted Deliverable can be undeleted/ restored using the "Delete and Restore Deliverables" utility. Go to the utility, enter the client name, click on Search, select the deleted Deliverable and click on Restore button

    Note: To access this utility, the users need Delete and Restore Deliverables user right.

13. **How do you permanently delete a deliverable from the task?** Deleted is grayed out at the task level.

    The soft deleted Deliverable can be deleted permanently using the "Delete and Restore Deliverables" utility. Go to the utility, enter the client name, click on Search, select the deleted Deliverable and click on Delete button

    Note: To access this utility, the users need Delete and Restore Deliverables user right.

14. **What does the "Eliminate eFile Steps" button do and why would you use it?**

    The "Eliminate eFile Steps" button will skip the eFile process and complete the Deliverables. It can only be used if the eFile process is not required to proceed and to complete the task.

15. **Is there a way to deactivate the 'Eliminate eFile Steps' button or restrict usage of the button?**

    The "Eliminate eFile Steps" button can be disabled by removing the Manage Shipping user right for the user but removing the user right will prevent updating the Shipping information and completing the task as well.

16. **Is there a way to remove the efile information if we have entered the consent received and efiled ondates in error?**

    Yes, the "Clear History" button in the Shipping section will clear the eFile information along with the updated Shipping information. Please select the required Deliverable under Shipping section and click on Clear History button.

17. **Can you create an email in the Points section for only selective Points?**

    Yes, please select only the required Points and click on Create E-mail so that the selected Points will show in the email draft.

18. **How do you Assign and Unassign a Checklist Item?**

    Please select the Checklist item under Checklist section and click on Assign button to assign the Checklist item or click on Unassign button to unassign the Checklist item.

    Note: To Assign or Unassign the Checklist item, please make sure the username is available under the Assigned Person column

19. **How can I delete an attachment added to the Deliverable?**

    You can delete the Attachment added to the Deliverable in Assembly Section by clicking on the X besides the attachment

20. **What is the purpose of the 'Copy From Prior' button?**

    If the Assembly & Shipping are not selected in the Rollover setup, the "Copy From Prior" button will help to pull the information (Assembly and Shipping) from the previous task to the rolled over task.

    Note: Copy From Prior button will only pull the Shipping Instructions for Shipping section but it will pull all the information for Assembly section.

21. **Is there a way to bulk update eFile information?**

    Yes, the eFile information can be updated in bulk from My View or Search page. Please select the tasks, hover over Task info action button, click/ select the eFile, update the required information and click on Save.

    Note: Make sure that the selected tasks' Deliverables Filing Type is eFile and the Date Delivered field has already updated in Shipping section.

22. **How do you reverse an extension closed in error?**

    If an Extension is created in error, there is currently no way in XCM to clear or delete the created Extension for the task, but you can get rid of the 'IP' or 'NIP' sign shown in the task. To remove the 'IP' or 'NIP' sign, you have to mark off the 'Not Filing EXT' option in the Extension section on the Task Routing Sheet for the Task. This will only clear the 'IP' or 'NIP' sign from the task and not the created Extension. So whenever the User tries to create Extension for the task, the Extension section will display with prior details.

    Note: Above suggestion is at your risk. Please make a note in Points or Comments field stating you marked as "Not Filing EXT". So that you will not miss the Extension in future for this particular task.

23. **The current Status of the Extension is 'Ext Not To Be Filed'. How do I extend the due date**?

    Please move the Extension to an active status and then extend the due date.

    - Go to Extension section of the task
    - Click on Move EXT button
    - Choose any active Status and Person (if required)
    - Click on Save

    Now you can extend the due date.

24. **Is there a way to delete a document that was wrongly uploaded in XCM using the Upload/DownloadFiles?**

    There is currently no option available in XCM to delete/ remove the Files which have been uploaded incorrectly under the "Xpitax - Outsourced Upload/Download Files" in Documents Section on the Task.

    I would suggest you to add a Point in Knowledge/ Instructions in the Points Section for the task or you can make a note in the 'Comments' field under the 'Miscellaneous' section of 'General Task Info' on the Task stating that "The file xxx was wrongly uploaded, please ignore".

25. **What is the purpose of Linked Tasks?**

    The main purpose of linking a Task to other Tasks is to view and manage the related Tasks efficiently. Tasks are linked to enable the user preparing the Task to easily view the information from all related Task items linked to it.

26. **How do you unlink a task that was linked incorrectly?**

    - Go to Linked Tasks section of the task
    - Select the incorrectly link task
    - Click on Delink button to unlink the task

27. **How do you print only the required sections from the Routing Sheet?**

    Please select the "Detailed" option under the "Print" on Task Routing Sheet and then enter the required page numbers in print preview page to print only the required pages.

28. **Is there a way to remove information from the Details section?**

    No, the information under the Details section cannot be removed as it is the history of the Task Movement.

29. **How do I change the Due Date for a Task Specific Deliverable that was incorrectly added?**

- Go to Deliverables section of the task
- Click on the added Task Specific Deliverable name (blue hyperlink)
- Change the due date as required
- Click on Save

30. **I have setup a due date with "Fixed Deliverable Due Date". How do I change it to "Configure DeliverableDue – Date based on Period End-Date"?**

- Go to Deliverables section of the task
- Click on the added Task Specific Deliverable name (blue hyperlink)
- Select the Option Configure Deliverable Due-Date based on Period End-Date
- Enter the required date date Day [ ] of Month [ ]
- Click on Save

31. **When I try to send an email from the points section nothing happens. What am I doing wrong?**

Please make sure that the default email app has been chosen as Outlook in your PC settings, then check your Outlook is configured correctly and check your Browser Settings whether the pop-up block is enabled for XCM site.

If still nothing happens, this need to be re-directed to our IT person to look into it further.

32. **In the staffing section how does staff end up in the + section under a role?**

If the Task Type is set for workflow mapping, the Role is mapped with a Status and the task to be assigned to the mapped person while moving the task. If you try to assign the task to the person who is not mapped (removing the default person and choosing the another person) in the workflow mapping then the default name will be grayed out and listed as secondary person in staffing section if the Routing Sheet Role (RSR) checkbox is checked off while moving the task.

Example: If 1040 task being mapped for
> From status - "No info In" | Next status - "Preparation" | Move to whom - "Responsible person"

If the Responsible Person name is "ABC",
When task moved from "No Info In" to "Preparation", the "To Whom" field auto populate the username ABC by default in move task window.

But, if you are moving the task to any other person like "BCA" by removing the name "ABC" from To Whom field and checked off the "Routing Sheet Role" checkbox in the Move Task window, then the ABC will be listed below (secondary person) in the Responsible Person role and BCA will be updated as Primary person for the role on the Task Routing Sheet. If the checkbox "Routing Sheet Role" unchecked while moving the task, the username "ABC" will stay as Primary person and the "BCA" will be listed below (secondary person).

33. **I created a new task type but there is no due date, why?**

The Task Type that you created is considered as Firm Specific Task Type (FST) and the FST will have the default General Deliverable which doesn't have a due date. You can either edit the General Deliverable or add a new Task Specific Deliverable to setup the due date. Or you can create Firm Specific Deliverable (FSD) for the Task Type in Create Deliverables and add it to the task.

Note: 1. To edit General or create Task Specific Deliverables, the users need "Create/Edit Task Specific Deliverables" user right
2. To create a Firm Specific Deliverable, the users need "Create Deliverables" user right

34. **I am trying to enter information in the eFile section but I can't click in the boxes can you help?**

Please make sure that the Filing Type of the Deliverable is eFile.

You can continue with the eFile steps only when the Shipping section is completed. Please make sure the Date Delivered filed is updated under the Shipping section for eFile Deliverables so that you can update the fields in eFile section.

Note: To update Shipping and eFile fields, the users need "Manage Shipping" user right

35. **When I click on a document I previously attached in the document section it won't open. Am I doingsomething wrong?**
All documents contained within the Xpitax – Outsourced Upload/Download Files Section on the Task Routing Sheet is accessible from the internet for 30 days. Once the 30 days period has passed, the link is no longer active.

If the documents need to be downloaded, we will forward it to our Outsourcing team to check the possibilities to restore them.

36. **The firm added some checklists for our 1040 tasks but I don't see them in my tasks. What do I need todo to see them?**

The newly added Checklists in the utility will not show up automatically on the task. Please click on **Apply Default** button under the Checklist section of the task to update the Checklists on that specific task.

Note: To apply the Default Checklists, the users need "Enable Default CheckList" user right