

XCM™ Solution Comparison

Accounting professionals have similar workflow management challenges, but small firms may have different technology needs. That's why XCM offers three solutions - **XCMessential™**, **XCMessential™ Plus**, and **XCM™** - to offer firms a gradual step up to a full workflow management system.

With XCMessential, sole practitioners and small firms with little to no IT infrastructure can start benefitting today from remote access, integration with Windows® Explorer, simplified due date monitoring and tracking, process automation, real-time work management, enhanced client service, and centralized knowledge management. As your firm's needs expand, you can easily upgrade to the XCMessential Plus or the full version of XCM, empowering you to easily and efficiently manage all types of work paperlessly.

Determine which solution is right for you:

XCMessential™	XCMessential™ Plus	XCM™
1 to 5 Users	6-10 Users	10+ Users
1 Location	1 Location	Multiple Locations
1 Workflow Category	2 Workflow Categories	All Categories: Task Categories: Tax Task Categories: Financial Task Categories: Bookkeeping/Accounting Task Categories: Other
Outsourcing Integration Windows® Explorer File Links	Outsourcing Integration Windows® Explorer File Links	Outsourcing Integration Windows® Explorer File Links ProSystem fx® Document File Links Internet URL Links
My View Real-Time To Do List	My View Real-Time To Do List	My View Real-Time To Do List Multiple Customizable Views Move Multiple Tasks Concurrently Move Multiple Extensions Concurrently Batch Extension Creation
Process Automation/Standardization Digital Routing Sheet Assembly Instructions/Details Shipping Instructions/Details eFile Tracking Automated Rollover	Process Automation/Standardization Digital Routing Sheet Assembly Instructions/Details Shipping Instructions/Details eFile Report Automated Rollover	Process Automation/Standardization Digital Routing Sheet Assembly Instructions/Details Shipping Instructions/Details eFile Report Automated Rollover Sign Off Page Engagement Knowledge Management
Due Date Monitoring Task Specific Jurisdictions	Due Date Monitoring Task Specific Jurisdictions	Due Date Monitoring Task Specific Jurisdictions Firm Specific Jurisdictions Add Jurisdictions in Bulk Extension Workflow
Knowledge Management Issues/Points Audit History	Knowledge Management Issues/Points Audit History	Knowledge Management Issues/Points Audit History Budget and Actual
Client Service/Management Reports Firm-Level Tasks Detail Report Firm-Level Summary Report Due Date Reports	Client Service/Management Reports Firm-Level Tasks Detail Report Firm-Level Summary Report Due Date Reports	Client Service/Management Reports Firm-Level Tasks Detail Report Firm-Level Summary Report Due Date By Jurisdictions Report Due Date Summary Report eFile Report Workload Report Routing Information Report Identify Task Status/Responsibility <i>Extensive Report Set (20+ Templates)</i> Move Task/Extension (Multiple) Quick Search Advanced Search
Manage Users Manage Firm Settings Manage Rollover Create/Delete Tasks & Data Purge Manage Clients, Groups, Import	Manage Users Manage Firm Settings Manage Rollover Create/Delete Tasks & Data Purge Manage Clients, Groups, Import	Manage Users Manage Firm Settings Manage Rollover Create/Delete Tasks & Data Purge Manage Clients, Groups, Import Recurring Tasks Build/Add Jurisdictions Manage Staffing Assignments Custom Task Types Custom Workflow <i>Extensive Utility Set</i>