



## CONNECT TO MORE APPLICATIONS FOR HIGHER VALUE

**XCMapi** is a group of application programming interfaces that allow users to integrate XCMworkflow and XCMscheduler with other software systems, such as practice management.

Regardless of the software, XCMapi offers the option to pull and push client, entity, task, employee, or time data from other software systems in real-time, to facilitate workflow, increase productivity, and inform reporting.

XCMapi authorizes developers to select which data can be connected to or extracted from XCM. It comes with software developers kit (SDK) and uses industry standard REST API capabilities to connect XCM with any other programs that leverage client, entity, task, employee, scheduling, or time information.

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### With XCMapi, you can:

- Pull or push data in or out of XCM and automatically combine it with associated information from another program
- Get forward-looking information and historical data out of XCM to make year-over-year comparisons by task, client, or employee
- Compare total output for a specific project or deliverable between employees, departments, or offices
- Integrate different management systems to share information between them
- Run more detailed, customized reports to analyze data in XCM more effectively and actionably
- Bulk upload and edit client information

XCMapi can help customers scale their businesses by providing more detailed data to better assess company and individual performance, bottlenecks, and inefficiencies. It allows users to easily compare data across management systems for a more holistic view of project statuses and business progress.

**By using XCMapi, you will gain:**

**Visibility** to real-time status updates and information across management programs

**Control** over what information can be exported and imported

**Flexibility** to add and edit client information in large batches

**Accountability** through comparisons of users, departments, and offices



XCM works with organizations to reduce turnaround times on client deliverables, such as tax returns, Client Accounting Services, and Audit Engagements—delivering a 5 times return on their investment. XCM can benefit organizations who need to decrease business process timeframes by:

1. Streamlining work routing to address bottlenecks
2. Enabling full transparency —so nothing falls through the cracks
3. Reducing the risk of costly errors with multi-jurisdictional due date tracking

Unlike other solutions that can't be restructured after implementation, XCM allows you to configure business processes to the way you work. This is combined with real-time analytics and reports so you can make instant decisions on your business. Our unique focus on rapid deployment ensures a payback of less than one year.

XCM is the only productivity enablement and workflow platform endorsed by the AICPA, and complies with the controls and applicable criteria of the AICPA Trust Service Principles.



To learn more about how XCMapi can increase productivity in your firm or tax department, contact us at **781.356.5152** or visit **xcmsolutions.com** today.