



## XCM™ Workflow

Increase your firm's productivity by up to 30% with this automated workflow tool.

XCM Workflow is the Web-based workflow automation application from XCM Solutions. This integral component of a completely paperless office can help you gain immediate productivity increases that translate into more billable hours and higher firm profits.

### IMPROVE YOUR PRODUCTIVITY

XCM Workflow moves all tasks through your office in assembly-line fashion, adding critical information along the way.

For example, if you're working on a tax return, XCM Workflow gives you real-time access to all the latest information about that return. You'll no longer have to spend countless non-billable hours chasing returns or looking for files, because XCM Workflow will show you the status of each task, and streamline the completion of all tasks related to a project.



XCM Workflow integrates with ProSystem fx Document to deliver a completely paperless workflow.

### CUSTOMIZE YOUR WORKFLOW

Don't spend your day sorting through piles of files – use software to take control of your workload.

With XCM Workflow, each firm employee has a custom home page that provides a detailed daily to-do list, which includes the steps required to complete each task on that list.

In addition, XCM Workflow automatically generates emails to employees, informing them of any status change related to one of their projects or returns. The end result is staff who are better able to efficiently manage their workload.

### IMPROVE YOUR CLIENT SERVICE

By using XCM Workflow, you can literally make each client feel like he or she is your most important client. Because the application gives you the ability to immediately tell a client the status of their deliverable, you'll no longer have to say, "Let me check and get back to you." The answers you need will be right at your fingertips.

Client communication will become simpler for you in other ways, too. When you have a client question, XCM Workflow will auto-populate an email to the client using pre-loaded templates. This feature saves you from having to re-type all your questions, giving you more time to focus on higher-value client services.

## MANAGE WORKFLOW ACROSS YOUR FIRM

Use XCM Workflow to manage work for all your firm's departments – including audit, tax, consulting, and human resources – through a single workflow solution.

- **Integration** – When you use XCM Workflow with ProSystem fx® Document, you can create links that take you directly to project-related source documents housed in Document.
- **Reminders** – Various reminders are set throughout XCM Workflow to help ensure nothing slips through the cracks.
- **Monitoring Capability** – On the home page and elsewhere in the program, you can see a detailed status of any project, including how and when it was delivered to the client, and who delivered it.
- **E-file Tracking** – XCM Workflow provides a complete automated tracking and monitoring solution for the e-filing process, from mailing the consent form to government acceptance.
- **Workload Balancing** – Allow firm management to see how much work is assigned to each staff member. XCM Workflow makes it easy to assign projects to staff with lighter workloads.
- **Customized Reporting** – Take advantage of comprehensive reporting and forecasting capabilities that help you increase your firm's profitability and productivity.
- **My Clients** – XCM Workflow allows partners, managers, and staff to view all of their client tasks with just a few clicks, regardless of the status or ownership of a particular task.
- **Due Date Monitoring** – Allow administrators to quickly see which return due dates must be extended.
- **Multi-office Capabilities** – Use XCM Workflow in a single office or a multi-office environment, and sharing work between departments becomes simple and feasible.
- **Interactive Question Pages** – Leverage a central area to post or answer questions, as well as post or respond to review comments.
- **Assembly Instructions** – Record assembly and shipping instructions for administrative staff.

- **Accessibility** – Since XCM Workflow is a Web-based application, you can access information and reports anytime and anywhere via an Internet browser.
- **Security** – XCM Workflow incorporates some of the most sophisticated and secure Web and storage technologies available, ensuring the confidentiality and security of the information stored in the system. Your clients' sensitive financial and tax information will be hosted here in the United States.
- **History** – Generate detailed reports that display all parties involved in completing a project, work done on the project, and the specific path and dates the project was routed through the office.

## IMPLEMENTATION AND TRAINING

XCM Solutions handles implementation of XCM Workflow – a process that typically takes less than a week – so your firm can immediately hit the ground running.

XCM Solutions also offers three Web-based training sessions to help maximize your ROI. One session focuses on best practices, another is tailored to administrators and power users, while the third session covers how XCM Workflow is typically used by staff, managers, and partners.

Your CCH sales representative can advise you about how to sign up for training.

For more information on XCM™ Workflow  
call 1-800-PFX-9998 (1-800-739-9998)  
or visit [CCHGroup.com](http://CCHGroup.com)

*The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at [CCHGroup.com/XCM](http://CCHGroup.com/XCM). If you plan to use multiple ProSystem fx Suite products within the same system, call 1-800-PFX-9998 (1-800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.*

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