

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us



781-356-5152

www.XCMsolutions.com

2012 Overall Rating 4.25

Best Fit

Firms using or considering the broader XCM Workflow Management system to provide structured digital management of their engagements, including the ability to securely share files with clients.

Strengths

- Simple client interface
- No storage or bandwidth/transfer limits
- Customizable firm branding
- Two-way firm/client sharing and collaboration
- Dependable hosting, security and uptime

- Broad support for mobile devices

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

streamlined way to manage everyday engagements in a mid-sized or larger practice, offering digital binders that help track all processes, documents, staff and communications within a practice. The XCMportal module is a natural extension of this system, enabling users to securely send and receive engagement-related documents. Pricing is based solely on the number of firm users, starting at \$500 annually for up to 15 firm-side users.

Firm User Experience 4

Client User Experience 4.5

Portal Capabilities 4

Technical Aspects 4.25

Help/Support 4.5

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved