CPA

Practice **Advisor**

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to-navigate look that puts important information at users' fingertips. Features like Quick and Advanced Search capabilities, My Reports, and interactive Dashboards give ...

Jun. 16, 2015



Cloud workflow provider XCM Solutions, LLC unveiled the 2015 release of its flagship XCM workflow automation software and integrated scheduling module on Monday at its annual user conference in Boston. The new release, available starting in July, uses the advanced technology of HTML5 to deliver a more consistent and powerful user experience across all major browsers, platforms, and devices.

"We've always drawn our inspiration from our users," said Mark Albrecht, CEO and

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summaries, average turn-around time, and yearly comparison reports.

Slide menus combined with more comprehensive screen views empower users to easily navigate to exactly the information they need in real-time with one click, saving time and giving them the flexibility to digitally store, print or export to Microsoft® Excel® all the information related to a job.

"I'm really excited for the new release and am impressed with what I've seen – from the cleaner look to the simplified navigation and the new functionality," said Ben Westbrook, Manager of Tax Administration & Scheduling at Friedman LLP. "It looks really nice – that may sound superficial, but that matters when you have 380+ people at the firm using it. And, giving partners real-time, on-demand access to their client work in a graphical dashboard every time they log in – that's powerful; that can change your whole season."

In addition to a more intuitive design, the new release delivers more powerful functionality including site-wide capabilities, like in-line editing and drag and drop, to further improve usability. It also delivers greater customization and optimized controls to make managing processes in all departments across the firm easier and more efficient. A new action bar is designed to give users more power in managing processes and manipulating the large volume of tracking, due date, and management data produced by partners and staff moving work through automated processes in the XCM software.

Designed by CPAs for the accounting profession, XCM is an intuitive, cloud-based application that automates and standardizes processes for completing work throughout the firm and in all departments, including audit, tax, consulting and human resources. XCM is the only standalone work-management solution for the entire firm, and was selected by the AICPA as its preferred provider for firm-wide workflow solutions.

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