



What's this? Account Contact Details

For proper set-up of XCM, XCMessential and XCMessential Plus accounts, it is necessary to designate an individual responsible for all three areas - Primary, Web Administration, and Billing Contacts - even if they are the same person.

Primary: This is the main point of contact for enhancements to the application, Best Practices & Advanced trainings, marketing materials and renewals.

Web Administrator: This is the person initially established in XCM during the account setup. They will be setting up users, changing and resetting passwords and providing individual user rights. The web administrator can manage staffing assignments, firm wide functionality for status', email notification, firm specific task types, firm settings, manage recurring tasks, and firm specific jurisdictions. The web administrator can bulk create new tasks, bulk delete tasks, bulk data purge manage deleted jurisdictions, and bulk rollover. Note: Functionality listed is determined by the product selected.

Billing Contact: This is the person assigned in XCM and our Billing database that will receive invoices for the firm and is contacted with any billing questions.