

Thomson Reuters FirmFlow API Utility

Fact Sheet

Summary

The FirmFlow API Utility is a program that retrieves data through the FirmFlow API and stores it into a local SQL database. As a result, you can run specific queries and connect the SQL database to different business analytic tools to gain insights about your FirmFlow data.



Pain Point

Firms have been asking for a FirmFlow API for many years. The data from the Tracking Report by Deliverable was released via an API in early 2019, however, many firms did not have the development staff needed in order to consume the data.



Solution

The FirmFlow API Utility allows firms to call the API and save the data to a local SQL database. The utility allows you to configure multiple requests which allows the firm to retrieve data across multiple service lines and workflow types within Thomson Reuters FirmFlow™.



Key Features

- Removes the need of a software developer to retrieve and consume FirmFlow API's. Being able to write SQL queries will be beneficial when using this utility.
- Automatically retrieve FirmFlow data. The utility can be executed on a schedule using Windows Scheduled Tasks.
- Additional data points are created when using the utility such as duration between routing steps and historic deliverable comparisons.
- As we release new FirmFlow APIs, we will update the utility accordingly.

The screenshot shows a software interface for configuring a data table. At the top, there is a text input field labeled 'Table Name' containing the text 'TAXRETURN'. Below this, the word 'JSON' is displayed. A large text area contains a JSON object with various fields and values, including 'Drawerid', 'Service Type', 'Engagement Type', 'Workflow', 'Current Step', 'PIC', 'Assigned To', 'Assigned On', 'Workflow Description', 'In Process Only', 'Status', 'Priority', 'Received On', 'Completed On', 'Sent On', 'Responsible', 'Assignment History', 'Received From', 'Sent To', 'Completed By', 'Accountable', 'Current Due Date', 'Original Due Date', 'Date Extended', 'Days At Step', 'Total Days At Step', 'Days Between Routings', 'Total Days In Process', 'Routing Details', 'Information Fields', and 'Indexes'. Below the JSON text area, there are five buttons: 'Add', 'Update', 'Delete', 'Test', and 'List'. The 'List' button is currently selected. Below the buttons is a table with the following structure:

	ListId	TableName	JSON
▶	1	TAXRETURN	{\"Drawerid\": \"000000001\", \"Service Type\": \"TAX\", \"Engagement Type\": \"\", \"Workflow\": \"TAX RETURN\", \"Current Step\": \"\", \"PIC\": \"\", \"Assigned To\": \"\", \"Assigned On\": \"\", \"Workflow Description\": \"\", \"In Process Only\": \"\", \"Status\": \"\", \"Priority\": \"\", \"Received On\": \"\", \"Completed On\": \"\", \"Sent On\": \"\", \"Responsible\": \"\", \"Assignment History\": \"\", \"Received From\": \"\", \"Sent To\": \"\", \"Completed By\": \"\", \"Accountable\": \"\", \"Current Due Date\": \"\", \"Original Due Date\": \"\", \"Date Extended\": \"\", \"Days At Step\": \"\", \"Total Days At Step\": \"\", \"Days Between Routings\": \"\", \"Total Days In Process\": \"\", \"Routing Details\": \"\", \"Information Fields\": [], \"Indexes\": [], \"PageNumber\": \"//Page//\"}

At the bottom of the interface, there is a 'Total Records' label and a 'Save' button.



The FirmFlow API Utility will be included with your existing FirmFlow license.



While the FirmFlow API Utility can be implemented without additional fees, Thomson Reuters offers implementation service and utility configuration.



- Automatically schedule the retrieval of FirmFlow data for reporting purposes in Power BI.
- View all open projects today versus last year on the 1st and 15th of the month. For example: show me my open projects on 10/1/2020 vs 10/1/2019.
- Determine bottlenecks within your workflow by viewing the duration between steps in your workflow.
- Provides your automated FirmFlow data in SQL which allows for updated data analytics and data driven decisions to happen.

Want to learn more?

Contact us at +1 800 968 8900 or cs.sales@tr.com.

Visit tax.tr.com/us/en/cs-professional-suite/firmflow

The intelligence, technology
and human expertise you need
to find trusted answers.



the answer company™
THOMSON REUTERS®