Commercial Logic—APS Advance

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From the July 2012 review of Practice Management systems.

Best Fit: Larger firms needing customized practice management integration with existing software architecture.

Strengths

- Offers strong customization options to adapt to most firm needs
- Microsoft SQL platform offers user scalability and unified reporting platform
- Program built around project management instead of time management functions
- Multiple modules available to further enhance management and reporting

Potential Limitations

- No current cloud offering for US based solution
- Smaller firms may not yield full benefits offered through system

APS Advanced Practice Management is a business intelligence system offered through APS, a company based in Sydney, Australia. APS Advanced Practice Management is the central product offering within the APS suite of products designed to make accounting and consulting firms more productive. Commercial Logic, Inc is the sole provider of APS products in North America and handles all sales and first line customer support. APS customer support is also available to North American clients from London, Sydney, and Auckland. Multiple modules are available and APS

Advanced Practice Management is designed as one of the most customizable practice

Microsoft SQL platform since 1997.

The interface design of APS Advanced Practice Management is similar to Microsoft Outlook 2007/2010. Most users will focus on the To Do list feature that shows all outstanding projects and tasks along with target due dates and accumulated time information. Depending on user rights, users may also view projects and tasks associated with other users. The interface is fully customizable for each user, but may be standardized throughout the system by implementing templates. Since the system is built on the Microsoft SQL platform, user scalability is easily achieved, especially for larger accounting firms.

TIME MANAGEMENT CAPABILITIES

New to APS Advanced Practice Management for the current North American release is a redesigned time sheet entry form designed by Commercial Logic, Inc. This new time sheet allows recording of time and expense associated with all clients and associated projects. Entered time may be automatically available for billing or may be manually posted by each user. Timers are available in the system and multiple timers may run simultaneously. Timers may also be started based on previously entered time and automatically pick up from the previously entered time amount. Time entry can be set to automatically round up or down based on company setup preferences. APS offers an Internet based time and expense keeping system as well.

APS Advanced Practice Management takes a different approach to project management. The system was originally designed for project management and the time keeping feature was integrated within this design. Due to this, there is a much tighter feel to the overall practice management setup. Project management in most systems is reliant on setting up the projects as one of the final steps. APS Advanced Practice Management implements the solution around each firms desired project management design. During company setup, the projects and associated tasks are

created and are used system wide to create consistency. These projects and tasks are

include text from a preset format or may choose items based on previous client invoices. All invoices are created with the implementation of the system and are designed to the accounting firm's specification.

MANAGEMENT FEATURES

APS Advanced Practice Management features dashboard views for each user and offers a high level of customization for each dashboard. Depending on user rights, users may have access to various benchmarking and client trend information as well as billing statistics. Further dashboard reports and complex database analysis may be viewed through APS Practice Intelligence, an available add-on module. APS Practice Intelligence also offers the ability to create custom SQL queries and export data to Microsoft Excel to perform pivot table computations. APS Advanced Practice Management features a number of reports specifically designed for CPAs and all reports are run through the SQL Server Reporting Service, which provides a robust and unified reporting platform.

INTEGRATION & DATA MANAGEMENT

APS Advanced Practice Management is the center of a suite of offerings from APS and directly integrates with each of these products. Native third-party integration is limited to Microsoft Excel, Word, and Outlook, Autonomy (formerly Interwoven) Document Management, and Quickbooks and Quickbooks Enterprise product offerings. APS Advanced Practice Management does not currently natively integrate with any US based tax software solution. The open database and system design, however, allow the software to be customized to integrate with virtually any tax or accounting solution. Any outside integration and data bridge technology will generally require consulting assistance from Commercial Logic or APS to build and maintain.

SUMMARY & PRICING

APS Advanced Practice Management offers strong customization options and is a system designed to conform to accounting firms of any size and client focus. APS Advanced Practice Management is best suited for accounting firms with 25 or more employees. Firms under this threshold may not yield all the benefits offered through the system. Since APS Advanced Practice Management is built on the Microsoft SQL platform, the system is fully scalable to firms employing a few dozen employees to those employing over 1,000. Pricing for the core module, including all time, billing, staff management, client contact management and workflow features starts at $300 per user. Additional modules and customization options are available and are generally priced per user dependent on needs.

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