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Commercial Logic — APS Advance Practice Management
603-643-1900
www.CommercialLogic.com

From the [June 2013 review](#) of practice management systems.

Best Firm Fit: Firms of 50 or more employees looking for a custom solution to maintain staff, client and project data.

Strengths

- Custom configuration to meet accounting firm needs
- Customized dashboard interfaces
- Business intelligence software directly integrates

Potential Limitations

- No current cloud offering for US based solution

APS Advance Practice Management is a practice management solution offered exclusively in the United States by Commercial Logic. At the core of the system is project management which is custom configured for each accounting firm. New for the current year are integrations with new document management systems and a number of invoice enhancements.

BASIC SYSTEM FUNCTIONS: 5 Stars

APS Advance Practice Management provides a different approach to traditional practice management solutions. User data is gathered on the front-end of the

software implementation process and is custom configured to meet the desired needs

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Several screens offer user customization options that allow the user to configure the screen to their preferred workflow.

TIME MANAGEMENT CAPABILITIES: 4.75 Stars

Time entry in APS Advance Practice Management may be done manually or through the use of timers. Multiple timers may be used concurrently and any posted time will be rounded in accordance to firm preferences. Additional time entry options are available through an Internet-based system or through Microsoft Outlook.

Project management is a core function of APS Advance Practice Management. Projects are based on workflow templates, which are created upon initial implementation of the solution. Each step in the project, called milestones within the program, may have a budget, be assigned to an employee, and have an actual due date or target date of completion. When users enter time, they are also provided the option to indicate completion of a milestone. This aids partners and owners to gauge what percent of the project has been completed and what resources may be required to complete the project.

APS Advance Practice Management provides a client dashboard that displays a variety of client related information. All WIP and outstanding accounts receivable information is available at a glance and underlying detail information is easily accessed. Users may customize this dashboard to further enhance client relationships.

INVOICING FUNCTIONS: 4.75 Stars

APS Advance Practice Management assembles approved time and expense data for each project. The partner or owner simply selects the time and expense data to invoice and then adjusts time up or down as necessary. Each invoice may include customized narratives or may pull from the standard invoice wording. All custom

and standard narratives must include an associated billing amount, which is then

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MANAGEMENT FEATURES: 4.5 Stars

Dashboard technology is utilized throughout APS Advance Practice Management to analyze staff, client and firm data. All dashboards are user customizable and may include a number of reports, graphs and other desired information.

Partners and owners are provided tools to further monitor staff workload balances and status of current projects. Staff may be moved from one project to another or added to a project through simple drag-and-drop technology.

APS Advance Practice IQ is a business intelligence solution available and works exclusively with APS Advance Practice Management software. This business intelligence software is browser based, but may be accessed directly within the system and provides a number of advanced reporting features. These reports may be used to benchmark current firm performance and profitability as well as generate dynamic reports on current client projects. Each report may be exported to Microsoft Excel as a Pivot Table for further analysis.

User rights are tightly controlled within the system to ensure appropriate data access. Firms may also preconfigure all data entry and output screens and limit the customization options available to users.

INTEGRATION & DATA MANAGEMENT: 4.25 Stars

APS Advance Practice Management is built on the Microsoft SQL platform and includes a number of integrated modules. All modules are provided from the same vendor and share this database technology. All the client, staff and firm management solutions offered through APS work seamlessly with each other.

New for the current release is integration with Virtual Cabinet, a document management solution offered through Lindenhouse Software. Native integration is

also provided for Microsoft Word, Excel and Outlook. Other integration points are

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APS Advance Practice Management provides help topics on each data entry and report screen in the system. As users navigate through the system, the help automatically adjusts to the screen currently in view.

APS Advance Practice Management is offered exclusively in the United States through Commercial Logic. Commercial Logic provides the first line of phone and email support as well as any training needs. Users have access to online training options through a separate help and support menu. Maintenance contracts are built into annual renewal fees.

Program updates are handled through Commercial Logic. After adequate testing has been completed, updates are pushed out to users. Since the majority of APS Advance Practice Management systems are custom configured, the updates are designed to integrate without disrupting current workflow setups.

SUMMARY & PRICING

APS Advance Practice Management is a solution offering custom configurations to meet the needs of accounting firms. Built on the sturdy Microsoft SQL platform, the solution is fully scalable for firms of all sizes, but generally firms of 50 employees or more will yield the best results. A number of dashboards are provided with APS Advance Practice Management and may be fully customized by end-users.

Business intelligence software is also available to assist partners in improving productivity and profitability of the firm as well as enhancing dashboard reporting. APS Advance Practice Management is priced per user and starts at around \$300 per user. Pricing includes the core time and billing module as well as all staff management, client contact management and workflow features. Custom configurations are provided through Commercial Logic and are priced depending on firm needs.

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