



Accountable Technology



APS Case Studies

D&V Accounting

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Involvement in selection process

I was the partner responsible for testing the product and making the final decision on which product to go with.

Key Quote

“Over 14 years of experience in accounting practices and working with various practice management software, APS is the most efficient and user friendly. It has definitely increased efficiency in areas of billing including WIP and debtor management and the client database is now an invaluable tool in producing the information required by our practice.

The move to APS Tax product in July 02 has significantly decreased the processing time due to the fantastic layout of the product. Easy to use screens and online help has greatly assisted our users processing.”

Section One General

When did your firm implement its APS Advance Practice Management system/
May 2002

Which edition did your firm sign up for – a) Professional or b) Enterprise
Professional Edition.

How many users do you have?
18 users

Which APS products have you taken out licences to use? (PM, Tax etc...)
Advance (Database, timesheets, WIP and debtors), Tax and XPA(Xcede Professional Accounting).
Tax has been fantastic, where the single database makes all the difference.

Who was your previous supplier and how long were you using that supplier's software for?
Solution 6

From start to finish, how long did the meeting, testing and decision-making process take that saw you
move over to APS?

We had our first demonstration of how Advance could help us in late 2001 demo – and thereafter it
took another two months in all to make the final decision to buy APS. We then implemented the
system in May 2002.

Was your decision to move over to APS made on gut-feel, or was it more scientific than that? Please
explain how you went about making your decision.... (e.g. team approach: IT manager, IT Partner,
Work Group etc...)

More scientific. We have remote offices, so remote access from home and client locations was a
major plus. APS gave us the ability to work in a more futuristic way (i.e. our people are on the move,
so the system needs to be accessible on the move also). Remote access using Sol6 was very slow.
APS on the other hand is fast and very flexible. The Windows environment has been a real plus as all
programs can be open at the same time, which saves a great deal of time. Also, the sorting ability of
the Advance database was a major factor in favour of APS.

Now that you have been using APS products for some time, has the product and service met your
expectations? If so, please tell me about it.

Well and truly. There are so many efficiencies in practice – you can pre-post time, and bill as the job
is completed. The whole billing process is simplified in comparison with what we were used to with
Sol6. All our practitioners can do their own bills, rather than having them delivered to a central billing
point.

Service has been great. Installation was great, with minimum pain. The APS Account Managers are
really helpful – they take problems we encounter on board and deal with them – and the Support
helpdesk is fantastic. 5 or 10 minutes is just about the timeframe versus, one or two days we were
used to in the past with Sol6.

I should also mention that APS Account Managers know their product inside-out, not just how to sell
it.

APS prides itself on its ability to listen to its customers regarding their business needs and business aims and its commitment to then work closely with customers to meet and achieve them. Tell us about the APS approach from your perspective.

The APS team see things through. For example, when we took on APS Tax Product it was brand new and clients such as ourselves gave lots of input as to what extra functionality was needed. The feedback was taken on board and almost everything suggested was added in: so, yes, the team is really responsive.

Section Two Product

Functionality Testing

Looking at APS from a product perspective, what were the most important factors from a functionality point-of-view that were seen as critical to your business – the things that APS had to have if it was to be considered as a your practice management and tax preparation software provider?

The ability for remote access was critical due to D&V's set up and location. Functionality in billing (per user), platform (windows, rather than DOS looking like windows) – meant lots of time could be saved because there was no longer a need to be opening and closing platforms and programs.

Did you feel that APS was ahead of its competitors in terms of its functionality and how did you verify the fact? (e.g. pilot / product testing methodology)

We felt Advance was well and truly 'years ahead'. We had been telling Sol6 for years about things we needed from our PM system - but it was never forthcoming.

How long did you pilot and test the Advance product set for functionality – and how many people were involved? Was the APS team accommodating in this process or did your APS contacts press you to make an early decision?

We had a full product demo in November 01 and we were given a demo disk – but as soon as we had the disk and we played with it we were sold as to why we should switch to APS.

We had the Tax demo kit for two weeks too which we spent some time playing with. To move to APS Tax was a big decision for us - but it turned out to be an easy change. Everything streams from the single database which makes life easier – no closing and opening of different packages, make a change on a tax return and it flows through to all other client data.

Did testing the Advance product set provide any positive surprises in terms of embedded functionality that you did not know about..... functionality that could help your business in a way that a PM system had not previously?

Yes it did actually – in particular the Notes system where you can actually type in client notes against the client file. This was a surprise as it went part of the way to enabling an electronic storage system for our practice.

For your firm, what were the 3 critical things that the APS Advance product and service offers over the competition that helped finalise the decision to go with APS in place of your incumbent supplier?

I have more than 3 items to relate here if that is okay. They need mentioning:

1. Issues in WIP and Billing efficiency. When comparing Sol6 to APS there was no comparison. We are now too efficient in this area.
2. Reliable database that we could use with notes and the merge facilities.
3. Cost compared to the alternative to swap Sol 6 to Xlon and the reports I had on the Xlon product.
4. Timesheet system that allowed diary style and pre posting of time. I perform exit interviews after a client's work is complete and this was always an issue in trying to account for this in a bill.
5. Sales pitch of David and Michael and the fact we had dealt with them before at Sol6.
6. The attitude of the new sales manager at Sol6.
7. Advance Professional Accounting using Excel as its reporting base. Although an expert in Freeform I had done 8 programming subjects at uni and had some knowledge. For any other user it was totally inflexible and impossible to use.

8. The promises of Sol 6 that they were replacing Freeform and other products with Windows based ones. This was started mid 90's and never came to be.
9. Remote office and home access / terminal server and Sol 6 stuffing us around with these issues.
10. We are now some years down the track and it is the best software change over I have been involved in. The APS sales pitch has proven to be right.

Ease-of-use testing

From a functionality point of view you have told us why you moved to APS. Ease-of-use is also important: how did you make sure that Advance is easy-to-use from a practitioners' perspective? Yes, we did test for ease-of-use..... the fact that we saved time through the database was a major plus. No closing and opening of programs. Very uncomplicated – particularly the Tax product. APS Tax loads tax returns on screen and has a certain drag & drop logic to it.

Was testing 'ease-of-use' an important part of your testing process? If so, how did you test the product set for ease of use?

Yes. The fact that staff are used to using the Windows environment made the whole thing really easy to introduce in the firm.

Future Development

What would you like to see APS add to its product set in its next releases of Advance that will assist your business? What does it need to do to stay ahead of its competitors?

The database needs to include an archiving system for Notes – this would be very useful. Some more information on the main screen would also be an added bonus.

But we don't have any major issues at this point regarding functionality.

Section Three Corporate Situation

Were the following factors important to you in determining if APS was the right provider for your firm to go with.

The fact that APS is a profitable business? APS prides itself on the fact that it has posted a profit every year since inception in 1991

Profitability is important, but not overly so. More important is that **lack of profit** in a supplier would put some doubt as to future viability of that supplier or its product.

The fact that the Advance product set traces its lineage and development path directly to its first release in 1994 there has been no deviation from the product roadmap – merely incremental annual upgrades to the product. This has meant that customers have not had to waste time and money implementing new systems on an intermittent basis

Not that important. More important is that there should be no future deviation due to cost concerns. So long as our hardware can cope with the software provided and that the software is Windows-based, this is not a problem.

What other corporate stability factors would you recommend that firms should consider when choosing a Practice Management system supplier?

Staff retention at APS is important. The fact that all the APS staff we have dealt are still there is good news, it shows the company is stable and it means that you build a solid working relationship.