

APS Talks Integration with Farrow Wyatt

Monthly APS case study

Farrow Wyatt is a progressive 5-partner firm of Chartered Accountants based in Maitland, NSW. An Advance user since 2007, the firm is an advocate of the way in which the APS team has integrated the Advance suite to the point where now all practice and client data is accessible via a single desktop window – the Advance Central Console. Here, client manager James Carr (who's also responsible for IT systems within the practice) gives us the firm's view on the APS team and software.

When did your firm implement its APS Advance Practice Management system?

We commenced a phased implementation in January 2007 and we have approximately 60 users on the system.

Which APS products have you taken out licences to use?

We started off by installing Practice Management, Practice IQ, Interwoven Document Management, Advance Tax, Xcede Professional Accounting (XPA), Business Process Automation (BPA). We're currently looking at Advance CRM and the Desktop Super SMSF administration application.

The Integrated Advance suite Can you tell me what the integrated Advance suite means to Farrow Wyatt? Essentially it means that the Advance applications work in an integrated way to pull together everything we need to service a client from a single window. This is a real step forward in practice software because, as users, we don't want to have to open different products in different windows to get to client data – the Advance suite does this for us via the Advance Central Console.

Can you give me an example of how Advance's integrated functionality is benefitting the firm in terms of process streamlining, time savings and productivity? It all comes back to the Central Console – with other vendors you have to open too many programs to get to the data you need to work on. With Advance we can work from within the Practice Management app all day and we can access all client data and Advance applications from that point – whether it's Tax or Professional Accounting or whatever. The fact we can customise data and reports that are relevant to a particular client is a real benefit. Does this make life easier for the user?

Life before APS Advance was extremely difficult particularly when you are talking about reporting. We were with MYOB and for us the day-to-day experience is as different as chalk and cheese. For example, if a client is on the phone and wants to talk about an invoice or a tax return of a set of accounts – it's all there at the click of the mouse – I can pull up absolutely everything and talk to the client with all relevant information in front of me. It makes our team members look like they are on top of things and it saves digging around for the information and having to call the client back. The same goes for dealing with information requests from business associates such as banks and financial planners – with the Central Console in Advance, we can let them have the information they require – either over the telephone or via an email – without any delay.

APS People

How have the people you work with at APS helped ensure you get the best out of the integrated Advance suite – how have they helped in practical terms? I think that this comes back to one of the main reasons we moved to APS. The APS team members we work with always tell us that they can make the system do whatever we want it to do – and then they deliver on this. This is a real sea-change. Before we moved to APS we were locked into what the software could do rather than what we wanted it to do. The APS consultants have worked with us and suggested best practice methods that might work for us – while very much taking on board what we wanted and how we wanted the suite to work for us. They've made it happen. They listen to practices like us and mould the software round you rather than expecting us to mould ourselves around the software. Flexibility and attitude is the key.

Functionality

How does the Advance suite compare to your previous product in terms of functionality? As I said earlier, it's chalk and cheese even though on the surface the two products do many of the same basic things. That said, speed and ease-of-access to data is the big difference between what we had and what we now have. The other big thing for us is Advance's reporting functionality – it's so easy to run reports from Advance applications and that gives us client efficiency as well as time savings in managing the practice.

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? In general terms APS comes up with some nifty ideas – but I think they should work even closer with practices to see what they want to further develop. At Farrow Wyatt, we're looking for some little changes and improvements to specific tasks. For example, I'm looking forward to the custom written tax application and some more work in the initial Central Console launch – bringing additional basic client info into view at launch.

Summing Up

Do you have any final words that sum up how you feel about APS, its team and its software? We're very happy with the product and the people - one of the major issues for us that made us make the switch to APS originally was APS's commitment to support. We weren't happy with this with our previous supplier but with APS that's completely turned around. Also we have access to the top guys and that is great from our perspective. You know you can get to talk to the likes of (APS CEO) Brian Armstrong when you want to, so yes, we're very happy. At the end of the day, we are a progressive firm that sees software functionality as critical to running a smooth business. In APS we have a partner that shares that view. If you would like to find out more, please contact Renne Daw on (02) 9965 1340 or alternatively renned@aps-advance.com

Contacts

Renne Daw
(02) 9965 1340
<mailto:renned@aps-advance.com>