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Since 1995, CSSI has served as the “Premier non-Advent provider of Advent related services.” Over 1000 firms have taken advantage of CSSI’s expertise to help them maximize the efficiency of their portfolio management software. Our Consulting group works with firms to optimize workflow and processes using a combination of process analysis, custom reporting, programming, and training.

If you’re thinking of migrating to APX®, we can help. We can assist with data cleanup, conversion of scripts, macros, and reports, in addition to assistance with testing, training, and parallel processing.

If you’re already on APX®, we can help. Whether you need customized SSRS reports, scripts, utilities, or training, we’ve “been there and done that.”

Call us. Let us help you get the most out of your investment in APX® and your other Advent products.

APX® Services Include:

- **Custom Reporting:** Replang is a reporting workhorse...best suited for operational, inhouse management reports. SSRS and it’s graphical look and feel make it well suited for client facing reports and report packages CSSI’s consulting group is able to assist with everything from a simple tweak to an existing report, to the complete creation and automation of quarterly report packages.
- **Automation:** With the ultimate goal of reducing touch points and saving time, CSSI has helped firms automate reconciliation, group builds, billing, and overnight batch reporting.
- **Data Cleanup Utilities –** Pre-process and post-process data cleanup utilities allow firms to implement rules for transaction cleanup. Start by making a list of everything your firm “eyeballs” in the trade blotter, and everything your firm changes before posting that trade blotter.
- **Custom Interfaces and Data Extracts –** Do you find yourself running reports in APX®, and the retyping or cutting/pasting numbers into spreadsheets? Don’t. We are experts at getting data into or out of APX®.

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Additional APX® Services:

- **System Analysis and Process Reviews –** Do you feel that there must be a better way to use your software? During an operational review, CSSI looks at your workflow, your processes, and your procedures, sitting with your operations team, traders, and key stakeholders. At the end of the visit, CSSI documents a list of recommendations, along with an action plan.
- **Training –** Report Writer Pro. SSRS reporting. Scripting. Reconciliation. Leverage our expertise to help your team grow stronger.