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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.

Most firms start with the ever popular “Free Downloads” available on the CSSI website. Many custom reports, scripts, and white papers are available free of charge. If you don’t find what you’re looking for, send us an email. We might have a solution available for you, but just haven’t gotten around to putting it on the website yet.

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

### Axys® Services Include:

- **Custom Reporting:** Axys® comes out-of-the-box with hundreds of reports, but firms often use these as starting points for their own custom look and feel. 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 Axys®, and the retyping or cutting/pasting numbers into spreadsheets? Don’t. We are experts at getting data into or out of Axys®.

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### Additional Axys® 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.
- **System Integration** – CSSI’s experts can help you integrate Axys® with other Third Party software, such as CRM systems, Trading systems, or web reporting software.