



Company Type

Small Tax Practice, San Jose

Industry

Accounting & Tax

How a San Jose-Based CPA Seamlessly Migrated 4 Lacerte Versions on a Single Cloud Desktop

Background:

A San Jose-based CPA wanted to move his tax software to the cloud for transitioning his business. Being a Lacerte user since past 10 years, he had client data stored across 7 Lacerte versions (Lacerte 2012 to Lacerte 2018). He wanted a seamless migration of the last four Lacerte versions (2015, 2016, 2017, 2018) on a single Cloud Desktop along with MS Office 2016 Professional.

Apps4Rent's Solution:

Migrate all the data files of the mentioned Lacerte versions to the cloud individually. Using a screenshare with customer, verify whether files are migrated to the cloud. When the customer approves, install the corresponding Lacerte version on the cloud. Repeat the process for every Lacerte version until all the data files are seamlessly migrated to the cloud.

Add Office 365 ProPlus E3 or E5 plan to replace existing MS Office.

Results:

All the requested Lacerte versions (2015, 2016, 2017, 2018) were migrated seamlessly on a single Cloud Desktop. All the Lacerte data files were copied exactly on a Cloud Desktop with zero data loss whatsoever.

Background:

A CPA was transitioning his small tax practice based in San Jose, California within a tight deadline. He was using 7 versions of Lacerte (2012 to 2018) along with Microsoft Office 2016 Professional for his day-to-day operations. He wanted to migrate four of the Lacerte versions: 2015, 2016, 2017, 2018. This along with the entire data files of those versions from his computer on Cloud. Since he had license for MS Office, he was looking to move that to the Cloud as well. However, the more he researched online, he was overwhelmed with the number of companies offering cloud hosting. Installing cross-version Lacerte data files on a single Cloud Desktop was going to be challenging.

Challenges Faced:

The customer had contacted Lacerte technical support earlier before contacting Apps4Rent. Even the Lacerte Support suggested that it was an uphill task to migrate all the data across 4 Lacerte versions on one Cloud Desktop. They predicted that some amount of data loss was inevitable. Being a single user for past 10 years, this was not acceptable to him. Plus, he had a license for Microsoft Office 2016 Professional which he wanted to move to the cloud as well. Since Microsoft doesn't allow MS Office on cloud, he also wanted a solution that could solve this problem too.

“I wanted to launch my small tax practice on the scheduled deadline due to pressure from clients. For that, I needed a hosting service that would take away all my headache. But I had 4 versions of Lacerte and MS Office to migrate to the cloud. I even contacted Lacerte Support, but wasn’t satisfied with the solution. Apps4Rent diligently migrated all the Lacerte data files without any data loss. Full marks to the team.”

James, Independent CPA & Owner of Small Tax Practice in San Jose, California

Apps4Rent’s Solution:

Apps4Rent engineers did a screenshare with the customer and scrutinized the Lacerte data structure on his computer. Then they copied the Lacerte data files of the respective version onto the cloud desktop. The customer monitored the data and when he approved, the corresponding version was migrated. This was repeated for every version until all the data was migrated onto the cloud desktop.

For MS Office migration, Apps4Rent recommended a different approach. As Microsoft only allows Office 365 ProPlus E3 or E5 on Cloud, Apps4Rent suggested to either use its Office 365 licenses or buy an additional Office 365 ProPlus plan at \$13/user/month. The customer opted for the latter along with Apps4Rent's Lacerte Hosting Dedicated Silver plan which came with 65 GB Disk Space, 4 GB RAM and 2 vCPU at \$39.95/month.

Results:

Apps4Rent engineers requested login credentials for Lacerte and Office 365 to install the company files on Cloud Desktop. Every version was moved separately to the cloud, after migrating respective data files of that version.

The entire process of data migration was challenging because it involved different versions of Lacerte. But the process was broken down into parts, and each part was carried out meticulously taking care of all the intricacies involved in data migration.

His business transition was successful and now he operates the Lacerte tax software from Cloud, the same way as on a physical desktop. With Lacerte tax software on Cloud Desktop, he gets the benefit of working from anywhere anytime from any device.

" Any company can do the technicalities but going way beyond your job to make sure the client is happy, only Apps4Rent did that for me. Despite the unique migration challenges, they turned it around quickly. I am amazed by their work ethic."

- James, Independent CPA & Owner of Small Tax Practice in San Jose, California