



## Company Type

Independent CPA, New Jersey

## Industry

Accounting & Tax

## How a New Jersey-Based CPA Successfully Migrated UltraTax CS 2018 to the Cloud

### Background:

A New Jersey-based CPA wanted to migrate his tax preparation software to the Cloud. With 2 users on UltraTax CS 2018 software, migration would provide better flexibility with anytime anywhere access. But a complex tax software like UltraTax CS requires significant effort along with proper guidance to migrate to the Cloud.

### Apps4Rent's Solution:

Migrate the individual data files of UltraTax CS 2018 version onto the Cloud with the help of screen share with Apps4Rent experts. Transfer all the files step-by-step, as guided by the expert, until all the UltraTax data is moved to the Cloud.

### Results:

The CPA successfully moved all the UltraTax data files on Apps4Rent's Cloud Desktop on his own. After adding the second user to the Cloud Desktop, both the users can now access UltraTax CS from anywhere, offering them the flexibility they always wanted.

## Background:

Dave is an independent CPA based in New Jersey offering his tax preparation services for small and medium businesses. He is mostly involved in tax preparation of elite clients in insurance sector and individuals with powerful connections. He works with his accountant, Steve, who shares his desktop based UltraTax CS software (2018 version) as it offers automated filings, error detection, and significant diagnostics. Even with such a powerful software, Steve and Dave often had to work long hours at office.

## Challenges Faced:

Dave and Steve were a competent team, but they had limited resources. Their UltraTax CS software was functional, but the constant rigor was affecting their work yield. Dave wanted to upgrade the solution and move to a cloud-based solution. UltraTax CS also offered online solutions, but that restricted them with a lot of features available on the desktop version of UltraTax CS. Moreover, they were quite used to working on desktop as they knew ins and outs of the software. Since they also dealt with some high-profile clients for tax preparation, every project required meticulous attention because of the huge dollars involved. Any blunder could be mean ouster of their business, apart from the legal procurements that may follow. UltraTax CS being such a powerful yet complicated software was very difficult to move onto the cloud.

*“Hosting UltraTax on cloud is not that simple. The software is powerful, but it is very complex. The integrated automated structure makes UltraTax migration to cloud very challenging. The Apps4Rent expert showed us exactly what I need to do. After the setup was done, I could hardly believe it was done by me. But it would not have been possible without Apps4Rent’s help. That’s for sure.”*

*- Dave, Independent CPA in Trenton, New Jersey*

## Apps4Rent’s Solution:

Dave was referred to Apps4Rent by one of their clients, who in turn, were happy with Apps4Rent’s performance as a hosting provider. Before contacting Apps4Rent, they went to a few other vendors, but they weren’t satisfied with the answers. Apps4Rent enquired the problem in detail, and the studied the structure of the software with a screen share. Our dedicated hosting expert went on call with Dave and explained him the entire process of UltraTax Cloud Hosting with a screen share. With an apt guidance, Dave was able to migrate the complex software successfully. He added one more user (Steve) to the Cloud Desktop.

## Results:

UltraTax CS 2018 software is available in real-time from any device now. Steve can work from home simultaneously as well, without missing any intricacies of high-profile tax preparation. There is no need to buy any technical equipment or software. With UltraTax CS hosting, the data is more secure than ever as Apps4Rent's top-tier data centers are SSAE certified, which matches the highest data security standards.

The UltraTax CS seems difficult to move to the cloud with all the complexities involved, but once the process is initiated, everything settles perfectly well. It can be accessed via remote browser, and updates customer on file return results in progress.