

Accounting and
Tax

Healthcare

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Web
Development



Case Study: CPA firm finds new home for UltraTax CS Professional Suite on Apps4Rent's hosted Citrix Desktop

Background:

A New York based certified public accounting (CPA) firm offering tax and audit services to companies. The company has twelve full-time employees and was looking for assistance to migrate content, data and CS Application from its server hosted with Thompson Reuters cloud environment to Citrix VDI with Apps4Rent along with the access to Microsoft Office.

The firm wanted to move data for Accounting CS, FileCabinet CS, Practice CS and [Ultra Tax CS](#) (years 2010 – 2019) to Apps4Rent hosted Citrix Virtual Desktop along with Office 365 Pro Plus access for twelve users.

Challenges Faced:

The service was showing unexpected errors while using the File Cabinet CS. The access to the hosted UltraTax was not as reliable as it used to be. Given the extremely high cost per user for hosting with Thomson Reuters, it certainly required a search for lower-cost vendors. Recent outages in connectivity made the client look for a better option without having to face such incidents and their consequences.

The firm decided to migrate to a good hosting service provider to get a prompt and efficient customer service along with the needed software support with minimum downtime. Everything at a low cost without compromising the least on data security. Ensuring complete protection of the sensitive and confidential data was very much a priority. The client was looking for a service provider long-standing in the market and expert in migration techniques without the risk of any data/content loss.

Additionally, the firm needed regular and automatic data to mitigate the chance and its aftermath of data loss in case of any incident of hard disk crash. It did not want to spend considerable money in maintaining an IT team to handle backups, updates, patches or disaster recovery.

After discussing with quite a few hosting service providers they finally decided to zero in on with Apps4Rent. Apps4Rent's eighteen years' involvement in cloud hosting and support services provided to various businesses worldwide, along with the intricate Ultra Tax FileCabinet CS migration experience gave the client the confidence that the project would be handled efficiently with the utmost care.

Solutions Delivered:

The technical experts from Apps4Rent took the data backup of the FileCabinet CS and restored them on Apps4Rent hosted Citrix virtual desktop, took the backup of Ultra Tax CS versions 2011, 2012 and 2013 and restored on the client's local desktop as per its requirement.

Next, Apps4Rent team successfully installed Ultra Tax versions 2017,2018 and 2019 on the client's virtual desktop and installed the Microsoft O365 with access to all the twelve users.

The client wanted to self-handle the backup and migration of the remaining Ultra Tax CS versions and the rest of the other data to the virtual desktop. The responsibility of the complete backup and migration of the Practice CS was given to Apps4Rent.

Accordingly, the technical team of App4Rent explained the migration process to the client on a remote session and finally the client was able to successfully complete the entire backup and migration. A few technical issues the client faced during the process such as error message while launching Ultra Tax Version was promptly mitigated by the team.

The Practice CS migration was a bit complex process as the backup option was not visible because the client's environment was a Virtual Office setup. Errors were coming during the application launch. On behalf of the client, Apps4Rent team contacted the Practice CS Support desk to fix the errors keeping the client in the loop. The SQL Server 2016 express edition was installed and configured to support the CS applications. The team persisted in the task until the entire project was completed with all errors taken care of and the client was happy.

Final Result

The client was satisfied because all the requirements were met well within time, such as the backup and restoration of the FileCabinet CS, migration of Ultra Tax CS versions 2011, 2012 and 2013 to the client's local desktop, installation of Ultra Tax versions 2017, 2018 and 2019 on the virtual desktop along with Microsoft O365 access given to the twelve users, complete backup and migration of the Practice CS and additionally the remote help extended to the client for the backup and migration of some of the Ultra Tax CS versions that the client wanted to handle on its own.

But there were additional sources of gratification also. Guaranteed 99.9% uptime, automatic data backup with on-demand recovery were some of these. The data housed in SSAE16 Type II data centers in New Jersey and New York with AICPA compliance, data security offered by CISCO ASAs with IPS enabled gave the client relief against any security breaches. How Apps4Rent team reached out extending help for mitigating the issues the client faced while self-migrating some of the data gave the firm the confidence of right-partnership with Apps4Rent.