

CASE STUDY

Verito's Tax and Accounting Focused Cloud Supports Firm's Goal of Enhanced Collaboration

Verito Private Cloud helped Hamilton Tax and Accounting cut IT costs and increased remote collaboration by allowing seamless work from any location, on any device.

BACKGROUND

Hamilton Tax and Accounting is a full-service Tax and Accounting Firm with multiple offices, founded in 2013. Steven C. Hamilton II EA founded the firm on the preface of providing expert bookkeeping and tax services to his clients from both in-office location and through digital means. They provide various business services, from tax preparation and consulting to CFO services to clients worldwide.

CHALLENGES

As Hamilton Tax and Accounting expanded their footprint to multiple offices, they ran into the inevitable problems of scaling up. They tried using software solutions for some of their issues like Teamviewer to remote in to troubleshoot. Latency issues were a constant source of frustration, resulting in a huge time sink and productivity loss. Keeping employees synced on the same Quickbooks file in different offices was another difficulty.

The only options were to use Quickbooks Online with its limited feature set or to email/dropbox Quickbooks files back and forth. The firm had limited mobility because their critical data was stored on-site on their local computers. They were unprepared for anything that limited their office computers' access - think worldwide pandemic that forced everyone to work from home for months.

SOFTWARE HOSTED

- QuickBooks Premier Accountant
- Drake Tax
- CFS TaxTools

At a Glance

BACKGROUND

- Full-Service Tax and Accounting Firm with Multiple Offices
- Provide expert bookkeeping and tax services in-office and through digital means

CHALLENGES

- Problems keeping multiple offices synchronized - collaboration was difficult
- Limited mobility because they were tied to their critical data that was stored on-site
- Unprepared for anything that limited office access

SOLUTION

They desired a Cloud provider that worked exclusively with Tax and Accounting firms and had experience with the various accounting and tax preparation software they used. Steven Hamilton says, "Verito helped us move to the cloud, which was a God send! We chose Verito because of their background and their focus on accounting and tax firms." Verito's expert technicians provided a solution that was faster and more affordable than the competition.

Verito's Turn-Key Tax and Accounting solution was a perfect fit for their software requirements. Hamilton Tax and Accounting uses Adobe, Drake, Taxtools, Tax Help Software, and Quickbooks.

RESULTS

Verito Technicians worked with Steven to set up his server to his specifications, loading all of his programs and software licenses. After ensuring that everything was set up correctly, Verito Pros handled data migration for him. All Steven needed to do was give them the OK, and they dealt with the rest. The transition was seamless, and he was live using his server within 24 hours.

By implementing Verito's Tax and Accounting Cloud, they have become more mobile and disaster-proof. Steven Hamilton says, "We now have the ability to work anywhere! And our remote staff can work easier than ever." Client and Team member satisfaction increased as they provided better service outside of business hours and were no longer tied to their desk. They can access their necessary data and applications from any device.

SOLUTION

- Verito's Turn-Key Tax and Accounting Solution perfectly met their software needs.
- Steven chose Verito for their extensive accounting-specific application hosting and software knowledge and experience.
- Verito Cloud turned out to be cheaper and faster than the competition.

RESULTS

- Steven Hamilton is extremely satisfied with his move to Verito Cloud.
- Increased mobility and ability to access business-critical data and applications from any device
- His staff were able to work from home during the COVID-19 Crisis without loss of productivity

Hands down Verito was one of the best things our practice ever implemented. The amount of flexibility we had during the Covid-19 crisis has been a huge resource to us

**Steven Hamilton, Owner
Hamilton Tax & Accounting**



Microsoft
Partner

vmware
PARTNER

WHY HOST WITH VERITO?

Dedicated Private Server: Host all your applications on a fully customizable, dedicated server. We offer dedicated servers to ensure the highest performance standards for our clients.

World-Class Security: We protect your applications and data with best in class security protocols, adhering to SOC2 and PCI-Compliance standards.

100% Tax and Accounting Pro Focused: We focus exclusively on accounting and tax software. Our expert support team is highly knowledgeable in all kinds of accounting and tax applications.

24/7/365 Technical Support: Our Microsoft Certified Professionals are available 24/7/365 for any support needs. 100% Customer satisfaction is our number one goal.

Daily Automated Backups: Our automated enterprise-grade daily backups ensure peace of mind. Never worry about data loss again.

Savings: Verito is more cost-effective than trying to manage on-premise networking with offsite backup yourself, with no up-front cost or monthly contract.

Business Continuity and Disaster Recovery: Our automated daily backups ensure business continuity and disaster recovery.

Seamless App and Add-on Integration: Our certified professionals are knowledgeable in all kinds of applications and add-ons. We are happy to assist with any integrations.

SLA-Backed 99.995% Uptime Guarantee: Our Data Centers, strategically located in Tier 4 locations, ensure maximum uptime with geographically disparate locations and data redundancy.

Scalable Resources and Plans: Pay only for the resources you use. Quickly scale up your resources for tax season with our no-contract plans and scale down when needed. No hidden fees to change plans.

Real-time Collaboration: Our platform provides real-time collaboration for any application on any device. Work seamlessly anywhere, anytime.

