

CASE STUDY

From 10 Years on Old Software to an AI-Powered Practice

FIRM FINTAX AJ PROFESSIONAL CORPORATION	LOCATION Greater Toronto Area, Ontario	PRACTICE Thousands of business and personal clients	TEAM ON MYCPACRM 15 to 20 staff and accountants, every day
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THE CHALLENGE

The firm ran on the same practice software for **ten years**. The team knew it well, but thousands of clients and years of records sat in a system that could only track work. Switching felt risky: all that data, and a team used to the old system.

- Every client reminder was an email a staff member wrote by hand.
- Client emails lived in each person's own mailbox.
- Bookkeeping ran in separate software, coded line by line.

THE SWITCH

- **Data replicated as is.** The MyCPACRM team handled the migration: ten years of clients, file numbers, staff assignments, client groups and every open file's status came across exactly as they were.
- **AI works the inbox.** Shared and personal mailboxes come together in one consolidated view, each email matched to its client file, and AI recommends what needs a reply or action.
- **AI does the bookkeeping.** Staff upload bank statements as PDFs; the AI reads them, extracts the transactions, and suggests the accounting head and HST treatment.
- **Organized the firm's way.** File numbers assigned automatically from the firm's own ranges, owners grouped with their corporations, a named preparer and manager on every file.
- **Deadlines and reminders run automatically,** generated years ahead across T2, GST/HST, payroll, T4, T5, WSIB and the firm's own services.

THE NUMBERS

100% of clients and tasks moved Replicated as is, nothing retyped	Zero downtime The team was working on day one	One view of shared and personal inboxes AI recommends what needs action	Days to hours bookkeeping with AI Statements read and coded automatically
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THE WHOLE TEAM, IN THE SYSTEM EVERY DAY. A system the firm runs on.

WHAT THE FIRM SAYS

“After ten years on the same software, we worried about the move. The MyCPACRM team took care of everything. We ask, they listen, and it gets done.”



Ajay Goyal

Principal, Fintax AJ Professional Corporation

“The AI reads our bank statements and codes the books, HST included. Days of bookkeeping become hours.”



Fintax AJ team member

Accountant

Switching software should not mean starting over. We move your practice for you.

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