

CASE STUDY

Case Study: Server Migration and Remote Access for a New Jersey CPA Firm

Multi-year tax database migration, new infrastructure, and secure remote access

Client: A well-known certified public accounting (CPA) firm in Union, NJ

Industry: Accounting, tax preparation and financial services

Services: Server hardware procurement, legacy database migration (2018 to 2024), 2025 software deployment, workstation and laptop setup, secure remote access

In the accounting industry, strict data compliance, tax software that is always available and the ability to work from anywhere are vital. A well-known CPA firm in Union, New Jersey asked Computer Services New Jersey to modernize its main server, organize its multi-year financial archives and prepare its staff for mobile access in the coming tax seasons.

The challenge

Accounting practices face their own IT challenges: annual software updates and strict retention rules for clients' historical data. This firm faced three:

- **Seven years of tax databases.** The firm kept tax database records from 2018 through 2024. Keeping them intact across seven years of different database versions meant exporting and importing them in the right order without damaging any client file.
- **The next software release.** Besides preserving past versions, the firm needed the 2025 tax software installed and the 2024 client data moved cleanly into it.
- **Hardware and remote access.** Staff needed upgraded hardware and pre-configured access to client files from outside the office, ready for high-volume filing periods.

What we did

We carried out a turn-key migration: hardware procurement, software installation, checks that the databases came across intact, and remote access for the staff.

1. A new server, set up for the job.

We sourced and bought a dedicated server suited to the firm's practice-management software, set up the environment, configured secure local user access and tuned it for heavy tax processing.

2. Seven years of databases, then the 2025 release.

We exported every legacy database, across all the historical software versions from 2018 to 2024, from the old environment and imported them to the new server. Once the history was confirmed intact, we installed the 2025 tax software and imported the active 2024 data into it.

3. Laptops, set up and reachable from anywhere.

We bought high-performance laptops for the staff, configured each with the right security profile, and connected the tax clients and database modules each person needed. We also set up encrypted remote access so staff could connect to the server safely from outside the office.

The result

The upgrade gave the firm a modern core for its IT:

- **History preserved.** All client databases from 2018 to 2024 were transferred intact, keeping audit trails and historical records without data loss.
- **Ready for the new tax year.** With the 2025 software running and the 2024 data imported, the firm's CPAs and accountants could serve clients straight away.
- **Working from anywhere, securely.** Ready-to-use laptops and encrypted remote access gave staff more flexibility while keeping sensitive financial data protected.

Reviewed and approved in writing by the client.

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