

# When Enough is Enough: Why This Growing Tax Firm Chose New Document Management Software During Tax Season

MSB Tax & Accounting | Tax and Accounting

Tax professionals know the drill: tax season is for tax work, not for shopping for new software. But for Sergio Bustamante, founder of MSB Tax & Accounting, the pain points with Thomson Reuters® Onvio became so severe that he made the decision to seek new software during the busiest time of year.

**“I’ll never forget this. It was so frustrating,”** Sergio recalls about the moment he knew he needed to make a change. “They changed my account and removed all my licenses on March 13th – right in the middle of corporate tax deadline.”

MSB Tax & Accounting had been growing rapidly through acquisitions, and their document management needs were growing with them. When they onboarded a new book of business, everything in [Onvio](#) started breaking down.

“The questionnaire wasn’t working, clients couldn’t access their portals, they couldn’t create accounts. For our growing firm, it was an absolute nightmare. We needed something that could scale with us.”

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What made the situation worse was that after paying for an upgraded license to access needed functionality, Onvio informed him that the updated function he wanted wasn’t even working. When they attempted to revert his account, they accidentally removed all his licenses during one of the busiest times of tax season.

That’s when Sergio made the bold decision to switch to [SmartVault](#).



## Making the Switch: A Strategic Approach

Despite the urgency, Sergio knew that a successful transition required careful planning. He started with the foundation: getting client data properly organized. “The key to a successful transition is starting with a clean client list from your tax software. That way, when you migrate to SmartVault, everything aligns perfectly between the systems.”

The firm took advantage of SmartVault’s pre-built folder templates to establish their filing structure. “They already have pre-built folder templates for you to use or customize. I ended up customizing them for my specific needs.”

Understanding the complexity of migration, Sergio made a strategic decision to complete the tax season in Onvio while preparing for the switch. “There’s no easy way to get out of Onvio. You have to physically save the files and drag and drop them.” The lack of an export function meant careful planning was needed for the migration. After tax season wrapped up, a staff member moved all documents to SmartVault, ensuring a clean transition.

## A Strategic Transition: Planning During Tax Season, Executing After

“When we were leaving Onvio, I was worried about how we could make the printing from UltraTax CS as painless as possible,” he explains. “Because you have to save the tax returns somewhere. What happens if you drop it into the wrong client folder?”

SmartVault provided the solution with its [SmartRouting technology](#) – an intelligent automation feature that recognizes documents and automatically files them in the correct client folders. This automated system ensures documents are correctly filed without manual intervention and creates consistency across the firm.

“It works great,” Sergio explains. “It’s like having robots on your team that automatically route documents for you. You don’t have to worry about documents going into the wrong folders.”

## Looking Forward

While making the decision to evaluate new software during tax season was unconventional, MSB Tax & Accounting’s strategic approach – purchasing SmartVault during tax season but executing the migration afterwards – proved to be the right move.

“With SmartVault as our document management foundation, we’re confident in our ability to scale efficiently while keeping our clients’ data secure and accessible,” Sergio concludes. Today, MSB Tax & Accounting continues to grow, knowing their document management solution can scale with them.