

Practice CS Migration Guide

for Accounting Firms Ready to Make the Switch

How to migrate your firm from *Practice CS*



Firms stuck on outdated systems like Practice CS and FileCabinet CS face the challenge of switching without a clear migration plan.



This guide walks you through how to migrate practice management systems, what will move, and what your team needs to do.



Plus, you'll see how firms are migrating off Practice CS in as little as two weeks.

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This guide is for the firm that knows it needs to move and wants a straight answer on what that takes—whether you’re the one making the case to a partner or the one running the project.

Why firms are *finally* making the move

Whether you're reading this because you're trying to convince a partner to switch systems, or because you'll be the one doing the work once it's approved, you already know why Practice CS has been on the chopping block for a while. Toggling between systems. Hunting for files. Feeling trapped on a platform that Thomson Reuters keeps investing in less each year.

Staying isn't free. But there hasn't been a deadline attached to the cost, until now.

HARD DEADLINE

Dec 31, 2027

FileCabinet CS, the document management system most Practice CS firms run alongside it, has a confirmed end-of-life date. After that, Thomson Reuters will no longer provide updates or support. Plan to be migrated well before the following busy season to avoid disruption.

Practice CS itself isn't standing still either. Thomson Reuters has spent years steering firms toward its cloud platform, Onvio, and investment in the legacy desktop suite keeps shrinking.

The cost of *waiting*

Firms don't lose clients because they switched practice management software too early. They're more likely to lose time, or even staff, because they waited too long on a system that wasn't keeping up.

The cost of waiting shows up in three specific ways, most of which will never appear on an invoice, but they'll compound over time and hold your firm back nonetheless.

Fragmentation

Staff toggle between two or three tools to do what one system should handle

Wasted Effort

Hours disappear each week into hunting for files and re-entering data that already exists

Vulnerability

Support and security weaken as investment in the legacy suite shrinks

The FileCabinet CS deadline forces the question for firms already on that system.

For firms not on that clock, the honest answer to "why now" is opportunity cost: every quarter spent toggling between tools and working around Practice CS's limits is a quarter of staff time you don't get back once it's gone.

How migrations work *now*

If you've talked to other firms about switching practice management software, you've probably heard horror stories, and a few years ago, they'd have been right to warn you. Moving off Practice CS used to mean exporting files one at a time, converting client records to PDFs individually, and handing the whole job to whoever on staff had the patience for it.

WHAT CANOPY CHANGES

Canopy changes the *size* of that effort. It's the least disruptive path off Practice CS available today, built to keep the migration from swalling an entire season.

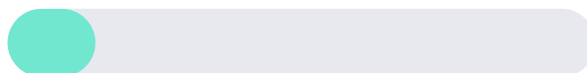
TYPICAL TIME TO MIGRATE

DOING IT YOURSELF



3-6 months

WITH CANOPY



~2 weeks

DIY MIGRATION

Your staff moves the data, file by file

Every file pulled out by hand, every record checked by hand, on top of client work.

CANOPY'S MIGRATION PROCESS

A specialist moves the data for you

Your team runs one guided export, then Canopy processes the data in bulk, whether your software is installed locally or hosted, matching records automatically with you reviewing every step.

What *moves* with you

Document-only migration tools may move all of your files, but the rest of your practice gets left behind. Canopy is built to bring over more than just your documents. Depending on your firm's setup, that can include:

01**CRM and contact records**

Primary, spouse, and additional contacts, each tracked as its own record

02**Historical invoicing**

Service items, payments, and credits carried over in full

03**Custom fields**

The fields you've built over the years, mapped into Canopy's structure

04**Documents and folders**

Client documents preserved with the folder structure your team already knows

Exactly what transfers, and how it maps into Canopy, depends on your specific Practice CS and FileCabinet CS setup. That's why every migration includes a named specialist who reviews your data and confirms the scope with you before anything moves.

Your migration, *step by step*

01**Assess and set goals****02****Get matched with a specialist****03****Run the extraction****04****Train, verify, go live****01**

Assess your setup and set goals

Before anything moves, take stock of what's currently in Practice CS and File Cabinet CS, which may include client records, active projects, billing history, and document archives. Then decide what you're trying to get out of the switch: faster client onboarding, less time hunting for files, or one system instead of three.

Loop in your team early. The smoothest migrations tend to have one clear owner, usually an operations manager or firm administrator, with buy-in from a partner before the project starts.

02

Get matched with a migration specialist

You'll be assigned a specialist to run the migration with you, from setup and export instructions through extraction, data mapping, and troubleshooting. They'll tell you plainly what's included, what isn't, and how long your migration is likely to take, before you commit to a start date.

03 Let the extraction run, then handle your part

Your team runs one export out of Practice CS and FileCabinet CS, usually a few hours of work, and your specialist walks you through it step by step. From there, Canopy's tooling takes over: it reads your data files directly rather than making anyone re-key or print records one at a time. Your specialist will flag exactly what needs your attention, and when.

STILL ON YOUR PLATE

Running the export from Practice CS and FileCabinet CS with your specialist's instructions in hand

Cleaning up duplicate contacts before the move, a common source of headaches later

Reviewing how your folders map to clients

Pulling together anything outside the core system, such as spreadsheets, standalone notes, etc

04 Train, verify, and go live

Migration runs alongside training on purpose. Your team needs to know how to use Canopy once the data lands, not just see that it arrived.

Before you flip the switch, it's important to verify your data landed correctly, confirm your custom workflows and permissions are set up the way you need, and make sure key reports and dashboards are pulling the numbers your team relies on. Then go live, with a plan for who's answering questions on day one.

What this looked like for *firms like yours*

“

I just moved from Practice CS / FileCabinet to Canopy. We successfully did it in six weeks. It has never been so easy to make a change. All data was migrated and imported successfully.

Trisha Floyd

Ramos & Floyd CPAs PLLC

Migrations are moving faster than ever. The part that used to take months—extracting the data—now takes days. Imagine all of your data from both Practice CS and FileCabinet CS, transferred over in just a few weeks, start to finish. That leaves the rest of the timeline for what matters most: making sure the move is done right.

“

We wanted to combine all of our systems into one rather than having to constantly toggle between different software all day. Canopy has done that for us and it has saved us so much time!

Morgan Judy

Training Coordinator, A.C.T. Services, Inc.

In the case of A.C.T. Services, the time they got back didn't come from the migration itself. It came from not having you switch between systems every day afterward.

Questions firms ask *before they commit*

“We can’t afford to disrupt tax season. When is the best time to do this?”

Timing matters. Talk to a specialist about scheduling your migration around your firm’s calendar.

“What does this cost?”

Canopy migrations run on a flat project fee, not an hourly clock that adds up as complications turn up. Your specialist confirms the exact cost for your firm’s setup based on per-module pricing.

“Can we keep using UltraTax?”

Yes. Canopy’s migration doesn’t touch your tax prep software. It also doesn’t sync return status back to UltraTax automatically; that’s a manual step for now.

“How much of this falls on my team?”

Less than you might expect. Before the project starts, your specialist lays out exactly what’s on you, mainly cleanup tasks like duplicate contacts and folder-to-client mapping.

“We’re on Virtual Office, not a local install. Does this still work?”

Yes. Canopy’s extraction works with both locally installed and virtually hosted Practice CS and FileCabinet CS environments.

“What happens to our data if something goes wrong?”

A named specialist runs your migration and reviews the process at every step, so problems get caught early instead of surfacing after go-live.

PLAN AHEAD

Three things to know before talking to a specialist

Your setup

Do you use a local install or Virtual Office? Which CS products do you run?

Your scale

Roughly how many clients and years of document archives do you need to transfer?

Your window

What are the best months for your firm to absorb a project like this?

Ready to leave Practice CS *behind*?

You don't have to wait until December 2027 to make the decision, and you don't have to figure out the scope, timeline, or cost on your own before you talk to someone. Get matched with a migration specialist, get a straight answer on what your specific move will look like, and find out how quickly your firm could make the move.

Start the switch with a demo today



Canopy is practice management software for accounting firms:
clients, documents, workflow, time and billing, in one place.

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