

CASE STUDY

Remote Bookkeeping Firm Escapes Right Networks Limitations and Unlocks Full Workflow Flexibility



FIRM SNAPSHOT



April Miller

- **Firm:** Sand Dollar Bookkeeping
- **Owner/Founder:** April Miller
- **Location:** Southwest Florida
- **Services:** Remote bookkeeping and advisory
- **Client Base:** Nationwide (96% QuickBooks Online, 4% QuickBooks Desktop legacy clients)
- **Previous Setup:** Right Networks shared hosting
- **Years with Verito:** 5+

THE CHALLENGE

April Miller built Sand Dollar Bookkeeping as a modern, remote advisory firm serving clients across the country. Her workflow relied on video tutorials, screen recordings, and fast communication to keep clients informed without constant phone calls.

Then Right Networks got in the way.

"I like to make a lot of videos. I use Loom. So if I want to show a client something, if I want to record my screen and show something that I see happening, **Right Networks wouldn't let us use Loom.** You can't use it."

The limitations kept stacking up. She couldn't use shared file systems for specific clients. She couldn't even email reports directly from QuickBooks.

"I couldn't email a profit and loss or something to myself. I couldn't do any of that within the Right Networks system."

When she asked for solutions, the answer was always the same: security restrictions. But those restrictions were killing her productivity.

"It really became **hindering to the business and how I could function.**"

For a firm built on efficiency and remote collaboration, these weren't minor inconveniences—they were roadblocks to serving clients the way she'd built her business to operate.

WHY VERITO

April asked colleagues for alternatives. "Everybody recommended you guys for the most part. Some people would recommend like Splashtop, but I don't think they understood what I was needing."

She was nervous about switching. "I didn't know how much legwork would be required for me or what would have to be done."

But the Right Networks limitations had become unbearable. She needed a hosting provider that would work with her business model, not against it.

THE SWITCH

"It was actually very easy."

Her IT person who's also a client helped point out a few technical requirements. Verito's team handled the rest.

AT A GLANCE

FIRM SNAPSHOT

- **Name:** April Miller
- **Location:** Southwest Florida
- **Services:** Remote bookkeeping and advisory
- **Client Base:** Nationwide

THE CHALLENGE

- April built Sand Dollar Bookkeeping as a modern, remote-first firm focused on efficiency, client education, and seamless digital communication.
- Right Networks' strict security limitations blocked essential tools like Loom, shared file systems, and even emailing reports directly from QuickBooks.
- These restrictions severely disrupted her workflow and productivity, preventing her from serving clients the way her business was designed to operate.

WHY VERITO

- After colleagues repeatedly recommended Verito, April decided to explore switching from Right Networks, despite initial nerves about the transition.
- Frustrated by Right Networks' rigid limitations, she sought a hosting provider that would support her flexible, collaborative business model instead of restricting it.

"It was very seamless."

No data loss. No extended downtime. No drama. Just a smooth transition from restricted shared hosting to a **dedicated server** that worked the way she needed it to.

THE RESULTS

Full workflow flexibility restored. April can now do everything Right Networks blocked.

"Now I can send reports out of Verito. I can email what I need. **I can record a video if I need to.**"

That means faster client communication, fewer meetings, and the ability to serve clients the way she built her business to operate.

"I can get done what I need to get done, which would save a phone call or a meeting, and just be like, **here's a two-minute Loom, and it's done.**"

When occasional issues do pop up, support handles them fast. "**Your support staff is really fantastic about time response.** As soon as I send an email, I'm getting the ticket right back."

Even when she needs help with tasks she's not familiar with like adding new QuickBooks files the team makes it simple. "I'm green when it comes to technology like that, but **they make it very, very easy.**"

She's been with Verito for five years now and has already referred other firms. "I actually did recommend a CPA who ended up using you guys."

THE BOTTOM LINE

After years of fighting Right Networks' security restrictions, April's firm finally has the flexibility to operate the way she built it with full control over her workflow and tools.

Five years later, no complaints.

Want similar results? Learn how Verito's dedicated servers give you the flexibility to run your firm your way without arbitrary restrictions.

AT A GLANCE

THE SWITCH

- April's migration to Verito was smooth and effortless, with no data loss or downtime.
- Her IT-savvy client helped identify technical needs, and Verito's team managed the entire setup seamlessly.
- The switch gave her a dedicated, flexible server environment perfectly aligned with how her business operates.

THE RESULTS

- With Verito, April regained full workflow flexibility—she can now email reports, record Loom videos, and communicate efficiently without restrictions.
- The platform allows her to save time with quick video explanations instead of meetings, streamlining client communication.
- Verito's fast, responsive support and easy technical assistance have kept her running smoothly for five years and she's confident enough to recommend Verito to other firms.

