



Automation and Technology Solutions for Practitioners



Gerry Anderson

CPA, CMA

Gerry Anderson, CPA, CMA, President at Blue Canyon CPA, built his practice on a deliberate, integrated technology stack anchored in Microsoft 365 with Copilot. The tools below represent his firm's current working environment across audit, tax, assurance and practice management.

Microsoft 365+ Copilot

Copilot transforms how you work across Word, Excel, PowerPoint, Outlook and Teams – drafting email responses, summarizing conversations, compiling audit documentation and recapping meetings, all pulled effortlessly from your Office 365 environment.



Use Cases

1. **Automated Agents:** Build agents to research, monitor emails, or answer FAQs, freeing up time for higher-value work.
2. **Email Management:** Summarize long emails, draft and polish responses in the right tone and flag bottlenecks like overdue or missed messages.
3. **Cross-Tool Integration:** Microsoft 365 integrates natively with Teams, SharePoint and OneDrive, keeping your workflow in one secure ecosystem.

Success Story

Copilot analyzes emails, meetings, and messages to extract insights relevant to each engagement. We record meetings in Teams, then use the transcription and summary to pull out key points and tasks. The full MP4 is saved to the server and Caseware.

Financial Cents

Financial Cents is an easy-to-use accounting practice management software to help you manage clients, work and teams, automate workflows and grow your firm.



Use Cases

1. **Secure Document Collection:** Clients upload documents directly to the engagement file via a controlled, auditable portal. No more email attachments.
2. **Client Collaboration:** Two-way messaging and client-visible task lists keep requests organized and cut down follow-ups.
3. **Workflow and Capacity Management:** Real-time visibility into progress and workload lets managers plan proactively, not reactively.

Success Story

Financial Cents replaces risky email attachments with a secure, centralized upload portal, giving staff full audit trails and visibility into client conversations. It can help manage clients, work and teams while automating workflows.

Caseware Cloud and AiDA

Caseware Cloud is a cloud-native audit solution with risk-based planning, collaboration and integrated reporting. AiDA is an AI tool embedded within Caseware Cloud, providing specialized, context-aware assistance, summarizing documents and drafting content to improve efficiency.



Use Cases

1. **Caseware AiDA:** AiDA acts as your AI-powered digital assistant that summarizes client PDFs, extracts key terms from agreements and reports and helps with error detection. By providing instant technical guidance and context aware guidance, it allows staff to focus on high-level professional judgment and drafting high quality narratives.
2. **Risk Assessment and CAS Compliance:** Built-in workflows guide the team through CAS-compliant risk assessment, documentation and completion procedures, reducing the risk of missing required steps.
3. **Electronic Review and Sign-Off:** Review notes, queries and sign-offs are managed within the file, eliminating paper-based review and speeding up the completion process across multiple engagement team members.

Success Stories

Caseware Cloud: CaseWare Cloud allows multiple staff members to work within the same engagement file concurrently, a critical capability for distributed teams that has materially reduced turnaround time on completion procedures and partner review.

AiDA: Helps staff in drafting narratives, summarizing documents, and providing contextual answers to technical questions. It reduces the time used 'hunting for information' and shifts your work to professional judgement, risk assessment and better compliance with practice standards and assurance standards.

**From Manual
to Automated:
Reclaim Your Time**

Gerry's Recommended Tools:

1 Microsoft 365+ Copilot

2 Financial Cents

3 Caseware Cloud

4 Caseware Cloud: AiDA



Tiffany Stewart

CPA, CMA

Tiffany Stewart, CPA, CMA, is a member of the Small and Medium Practices Advisory Committee (SMPAC) and approaches technology through the lens of time constraints, limited internal resources and client adoption challenges. Her focus is on tools that remove administrative burden, enable self-service and support incremental automation.

Dext

Dext is a receipt and document capture tool that extracts and codes financial data from receipts and statements. Tiffany describes Dext as non-negotiable in her practice, particularly for reducing manual data entry and administrative work.



Use Cases

1. Automatically extract data from receipts and supplier statements.
2. Pull documents directly from vendors (e.g., Amazon Business, telecom providers).
3. Attach source documentation directly to accounting records.

Success Story

Tiffany's entire practice uses Dext. By automating receipt capture and coding, she cut manual effort for herself and clients, freeing her up for higher-value advisory work.

Claude

Claude is an AI tool that stands out for its nuanced reasoning, long-form writing and ability to handle office productivity tasks, making it particularly well-suited for CPA work.



Use Cases

1. Build HTML dashboards tracking sales progress YoY and QoQ, plus a live leaderboard ranking team members in real time – just copy and paste the link into any browser.
2. Create financial models for complex, department-based commission structures, moving from single spreadsheets to multiple models consolidated into one dashboard.



Why it Matters

Claude cuts time spent building static models and spreadsheets, delivering practical results with minimal investment. Start with simple projects that address clear pain points, auditing along the way. Claude also produces auditable workbooks with clear workings, making output easy to check – no coding experience required.

Appsumo

Appsumo is a marketplace for early-stage and emerging software tools, often offering lifetime pricing.



Use Cases

1. Experiment with tools at low cost.
2. Avoid long-term financial commitments.
3. Test automation ideas quickly.



Why it Matters

To avoid recurring software subscriptions, you can use AppSumo to experiment with tools. Some tools will fail but it is an acceptable trade-off when costs are low and learning value is high.

**Small Changes,
Big Time Savings**

Tiffany's Recommended Tools:

1

Dext

2

Claude

3

Appsumo

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Learn more about the [responsible use of AI in professional practice here](#).

