

# Dext

# Case Study

## Reconciled

Powering Virtual  
Accountancy with Dext

## Optimized workflows

that continues to bring industry-leading  
value to nationwide clients



**“With Dext as a standard part of the tech stack, we give our clients a tool that sits on their phones. So it’s almost like our firm is going with them wherever they go.”**



**Michael Ly**  
CEO and Owner  
Reconciled



## About

Michael Ly is the CEO and Owner of Reconciled, a virtual accounting firm providing services across the United States. Since its founding, Reconciled utilizes an advanced tech stack that continuously allows it to evolve services to its clients.

Michael brings an entrepreneurial viewpoint to accounting, allowing his firm to make the jump to serving its clients in a fully digital way. Combining the traditional accounting firm foundation built on customer service with a growth mindset, Michael was able to turn Reconciled into a rapidly expanding virtual accounting firm.

As a Dext user, Michael utilizes our platform to provide ease of access and automation to Reconciled’s clients to ensure that they can provide the raw data his team needs to provide the exceptional level of advisory services that his clients depend on.



## Challenge

Reconciled needed to create a versatile tech stack poised for growth and a centralized location for document submission. For Reconciled they needed to find the answer to the virtual official dilemma. “How do we make it so clients don’t mail us anything? Because we want to be added, we want to be digital, an officeless company. So how do we do that?” For Reconciled, Dext was the answer to that question. As a fully virtual firm, Reconciled required the flexibility that Dext provided to ensure that their clients could easily submit, access, and review invoices while maintaining a transparent view into their cash flows.

When building their tech stack five years ago, there weren’t many options that fulfilled their needs. Initially, their process was an intensive internal testing module that required vetting of each potential tool. When deciding what tech to go with, Reconciled had to consider the overall package. It was essential to find a solution that enabled them to operate as an entirely virtual operation.



## Solution

Reconciled used Dext to offer the optimized experience it required. Michael explained, "With Dext as a standard part of the tech stack, we give our clients a tool that sits on their phones. So it's almost like our firm is going with them wherever they go. Because commerce and their business go wherever they are, it's only fitting that we provide an extension of our firm to be integrated into their business life."

For Reconciled, including Dext in their arsenal has helped their firm provide additional value to their clients. Michael notes that throughout his experience managing his firm, he continues to use Dext because it continuously provides the service and product he needs to serve his clients. Providing consistent updates and ensuring that client needs are met is why Reconciled continues to stay with and utilize Dext in their tech stack.



## Impact

With Dext, Reconciled is able to optimize output and increase productivity.

Through the use of Dext's automation platform, quickly highlighting and processing invoice information reduces the manual effort needed for tracking every receipt.

Dext's platform allowed Reconciled to save an average of ten percent of the time per week, per client, giving them the opportunity to offer additional advisory services and providing an enhanced look into their client's workflows.

Through this approach, Michael can provide higher value-added consultations to his clients and spend less time organizing and finding documents. Dext's platform allows for smooth and practical access to client invoices and increased transparency into cash flows, allowing for impactful advisory services.

With Dext, Reconciled has created a cloud-based system of optimized workflows that continues to bring industry-leading value to their growing list of nationwide clients.

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redefine  
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advisory?**

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