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returns, and offers easy online access, with users able to access the application ...

Mary Girsch-Bock • Aug. 27, 2018



Intuit ProConnect Tax Online

<https://proconnect.intuit.com/tax-online>

From the 2018 reviews of professional tax preparation systems.

ProConnect Tax Online is best suited for both multi-service and tax-only firms that

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Online.

ProConnect Tax Online offers intuitive system navigation, with a clean and uncluttered user interface. Users can access system features using the menu to the left of the screen, and there is an e-file dashboard available where all e-filed returns can be managed. offering a variety of features designed to make return navigation easy such as a super search option that allows users to search in a specific return terms such as name, amount, or even line number. The system also offers a split screen view, so users can view the form being prepared as well as data entry fields. Another great feature is the ability to view a summary of client data for the current and prior year.

ProConnect Tax Online, based on the Lacerte tax engine which has been around since 1978, supports more than 5,600 forms and schedules for forms 1040, 1120, 1120S, 1065, 1041, 990, and 709. Data entry fields mirror the form being processed, and the application offers more than 18,000 automated calculations and 21,000 diagnostics to help ensure both speed and accuracy. E-filing is supported for both federal and state forms, and the e-file dashboard, mentioned earlier, provides users with a quick overview of the status of all e-filed returns including form rejections.

Intuit Link is ProConnect Tax Online's document management solution and It provides users a way to collect, import, and store client documents and data. The product also works to reduce the amount of paperwork required in the office, eliminating the need to accept and retain a large amount of paperwork. Intuit Link works as an online portal, with users able to invite clients to sign up for the portal in order to upload documents. Once documents have been requested, users can log into the dashboard within ProConnect Tax Online to track client progress in providing the documentation requested. The product also allows users to create a default tax organizer for their firm along with a custom engagement letter and document

checklist. ProConnect Tax Online also integrates with eSignature from DocuSign that

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preparation fees directly from their refund.

ProConnect Tax Online offers seamless trial balance integration with QuickBooks Online Accountant, and also allows users to easily import multiple types of documents including W-2's, K-1 forms, and Schedule D data directly from Excel. The product also allows users to import data via scanner or mobile device, or users can simply download them directly from the provider. The ability to import other key documents such as 1099-INT, 1099-DIV, 1098, 1099-T and 1099-R is expected to be available in the near future.

ProConnect Tax Online helps firms with advisory services with their tax planning tool. The tax planner inside ProConnect Tax Online allows firms to plan ahead with their customers by building tax scenarios for 1040 and Schedule C clients. It takes into account all of the latest tax reform changes and allows firms to create multiple case scenarios up to 3 years.

ProConnect Tax Online offers a variety of user tools and resources including Alerts and Trending Options, Getting Started, updates, and a list of top FAQs. The ProConnect Tax Online Training Center offers access to training videos, webinars, as well as detailed instructions on how to convert or transfer data from an existing system to ProConnect Tax Online. A comprehensive knowledgebase is available, and users can contact support via telephone and chat, with support costs included in the application.

Best suited for growing small to medium sized multi-service and tax only firms that process a limited number of returns, ProConnect Tax Online offers two pricing strategies; one for 1040 returns and one for business returns. Pricing includes federal, state, multi-state, and municipal e-filing, with pricing per return. For 1040 filing, 1-9 returns are \$43.95 each; 10-49 returns are \$30.95 each; and 50-99 returns \$20.95 each, with special pricing available for more than 100 returns. Business return

pricing is currently \$54.95 each for 1-9 returns; \$43.95 each for 10-49 returns, and

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