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& [Accounting Research Systems](#).*

Intuit

has enriched the Lacerte and ProSeries tax preparation products by launching ProLine Tax Research this year, which includes the analysis and content library of BNA. The result is an interactive environment where the preparer can research topics and enter tax data from the same window. Depending on the preparer's work habits and comfort level, this could be an ideal platform for higher productivity.

The vendor's stated strategy is to offer accountants and tax preparers the tools to increase productivity and help them increase their firms' revenue.

Ease of Use/Search Routine:

The key point to understand about ProLine Tax Research is the integration of tax research and preparation. As the preparer moves to different fields on the tax data input screen on the top half of the window, selected search results appear in the lower portion of the screen that are relevant to the specific topic being addressed. In other words, this is context-sensitive Help, as seen in other software packages. Research can also be done by searching in the open text search box located everywhere in Lacerte or ProSeries or separately by opening a dummy tax return. The search input is optimized for keywords and strings and does not support complex Boolean inputs.

The strategy adopted by Intuit here is to present the results sorted by relevancy, which is constantly being evaluated based on new content and the input received from the actual users. As their tax preparer client base uses the system, they

vote on the relevancy of a document in the result set by indicating whether

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presents searchable and cross-linked reference to all standard U.S. publicly available sources. Included are the Internal Revenue Code, forms, tables, pending legislation; all these for Federal and State memoranda and so forth. Wrapped around the base content are the rich editorial, analysis from BNA. The result is more than 1.5 million searchable and cross-linked sections and documents.

Customization:

The ProLine Tax Research screens are clean and intuitive to use, and the research content dynamically changes with the context of the data input area. The overall layout is static, meaning the user cannot change the structure. There is no provision for saving standalone searches, which is appropriate for the ProLine paradigm of research only in the context of a specific tax return. What ProLine Tax Research does offer is the ability to create an audit trail for a return by marking individual documents from the research to be saved with the return data. The end result is a return with documentation supporting treatment of individual items.

Help, Support & Updates:

ProLine Tax Research's Help and support in using the product is provided online and via phone, Help screens and an Ask Live feature, which operates like a chat window. Enter a question on how to use the search feature, for example, and an immediate search is done within the ever-growing text knowledgebase. Actual humans might even respond from either Intuit or the user community. This novel approach combines the best features of both standard text Help content and an online forum monitored by experienced and interested people.

Content updates weekly, with no manual actions required by the tax preparer. The Intuit ProLine Tax Research product is available now, but the entire offering is in a state of highly active development, with new features planned for near-term

availability. All of the features reviewed here are in release as of mid October.

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