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### **Intuit — Lacerte & ProSeries DMS**

**800-765-7777**

**[Lacerte.intuit.com](https://lacerte.intuit.com), [Proseries.intuit.com](https://proseries.intuit.com)**

#### **Best Firm Fit:**

The primary value of these two document storage systems is based in their direct integration with the ProSeries and Lacerte tax preparation software applications. If you're a tax practitioner using either of these programs, or are considering a switch to them, the integrated DMS is a natural solution. This is further enhanced by the integrated "Productivity Plus" bundle that includes the Tax Analyzer and Tax Planner applications along with the DMS.

#### **Strengths:**

- Direct integration with ProSeries and Lacerte tax preparation software
- Create a customized standard file folder structure that can be edited per client
- Direct integration with Outlook, Word and Excel applications
- Direct upload of client lists from the ProSeries and Lacerte tax software
- Integrated application to scan and import 1040 tax supporting documents that can transfer data from the forms directly into the tax software.

#### **Potential Limitations:**

- Not available as a web hosted solution

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folder is deleted the system will not delete that folder at the client level if it contains files.

- The client folder will be updated with a new tax folder for each year's tax files.
- PDF files can be emailed from within the DMS and you will have the option to apply password protection and to choose whether or not to include annotations on the document.
- MS Office Outlook, Excel and Word files can be stored in their native format.
- A new archive feature will archive documents by folder or by client. It exports the documents out to a Windows Explore folder and removes it from the DMS.
- Files are encrypted while stored in DMS, when you archive and export they are no longer encrypted
- The DMS includes a proprietary PDF viewer, or you can use Adobe Acrobat
- You can send documents directly to an online fax system or burn files and folders to a CD for offline storage or transfer.
- The DMS PDF print driver will print files to PDF format.
- The "Save to DMS" feature lets you save files directly to the DMS from virtually any application.
- You can setup user rights that control access to files. The system offers fourteen different permission levels such as read only, print, etc.

### **Summary & Pricing:**

The Intuit ProSeries and Lacerte DMS offer a simple, effective and inexpensive document storage solution. The Lacerte Productivity Plus offering which includes DMS, Tax Analyzer and Tax Planner for \$249 is available only to Lacerte customers. The ProSeries DMS offering is sold individually for \$450.

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