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accounting firms

System includes integration with Lacerte and QuickBooks, as well as offering convenient dashboards and filters to help management and staff get full view of engagements and staff productivity.

Isaac M. O'Bannon • Jun. 05, 2013



LOS ANGELES – On Monday, Intuit introduced its new, completely online practice management system for accounting firms. **Intuit Practice Management** is designed to help accounting professionals more efficiently manage their workflow, engagements and time within their practice, from any computer with an Internet connection. The

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“As firms grow, they face several challenges associated with managing a larger client base and the additional employees needed to serve them,” said Aaron Brady, senior product manager, at Intuit. “Intuit Practice Management helps eliminate those challenges by giving users instant access to a web-based dashboard that provides confidence projects are being completed on time while also providing insights into a firm’s profitability and employees’ productivity.”

Intuit Practice Management comes with four core components that are focused on engagement tracking, client management, time and billing, and reporting:

- **All Your Work in One Place:** With Intuit Practice Management users can view, track, and take action on all work from across the firm in one easy-to-use dashboard. Filters help to quickly understand where open engagements are by work stage, status, staff assignment or due date.
- **All Clients in One Place:** Includes a single client list from both Lacerte and QuickBooks that is updated in real time and provides a summary view by client, including notes, engagement status/history, billing information and contact information.
- **Simplified Time Tracking and Billing:** Provides managers or partners the ability to view real-time profitability, staff & client productivity and open work-in-progress. Invoices can quickly be created and batch posted into QuickBooks without re-entering any data.
- **Powerful Reporting:** Robust reporting capabilities aggregate data from multiple sources in real time helping to profitably manage the firm, employees and clients.

“There were several determining factors that led us to choose Intuit Practice Management, including Intuit’s reputation and position within the accounting industry and the product’s ease-of-use and integration with Lacerte,” said Darrell Layman, owner of [Darrell Layman, CPA](#). “Because it’s online, when Lacerte is

updated, Intuit Practice Management is automatically updated with no dual entries.

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