Intuit Lacerte and ProSeries DMS

800.765.7777 (Lacerte) – **http://accountants.intuit.com/lacerte**
800.934.1040 (ProSeries) – **http://accountants.intuit.com/proseries**

From the July 2013 review of Document Storage systems.

Best Firm Fit: Small tax and accounting firms who use Intuit's Lacerte or ProSeries tax software and need to store documents associated with tax engagements.

Strengths

- Good direct integration with the Lacerte and ProSeries applications, including Lacerte Tax Planner, Intuit Tax Import, and other offerings.
- Documents can also be saved directly to DMS from Microsoft Word, Excel, and Outlook with the included DMS add-in.
- Users can create a standardized default folder structure for each client.
- Annotations can be made with this solution, and practitioners can choose to exclude the annotations when sharing documents with outside parties.
- Although Intuit does not currently have a traditional client portal offering (our preferred method for securely delivering confidential documents), documents can be faxed directly using a fax modem or a password protected PDF can be e-mailed directly from DMS.

Potential Limitations

- Users need to use the Lacerte or ProSeries tax software to use this application effectively.
- Hosting options for using this tool from the cloud are limited, and the product does not support integration with the cloud-based Intuit Tax Online tax prep solution.

Overview

documents of all types.   A basic search feature is included, but the software does not allow users to search for items and terms within the contents of the files.

Tools for viewing and annotating documents are included with the application, and the annotations are stored in a separate layer so that they can be removed if necessary. Modifiable templates are available for subfolders for each client, and a subfolder is created automatically for each tax year by Lacerte and ProSeries when documents are published which related to that year. Documents can be archived by folder or on a by client basis.

DMS supports TWAIN and WIA compliant scanners, and offers one such scanner, the HP ScanJet Enterprise 7000 v2, through its website. Documents can be imported directly into DMS from the print dialog in the tax applications, printed from any Windows application to the included Lacerte DMS PDF printer, or by dragging and dropping files into the application.

An add-in for Microsoft Word, Excel, and Outlook allows users to save the active document directly to a specific folder in DMS. The application can also be used in connection with the Intuit Tax Import service, which allows clients to enter passwords which permit direct download and import of information from financial institutions and payroll providers.

There are few commercial hosting providers which will host this application for users, and hosting of this application is not explicitly supported by Intuit. As a result, DMS may not be the best solution for firms with remote workers, multi-office firms, or those who work from virtual offices.

Files are encrypted at rest when stored in DMS, and are only decrypted when they are exported from the software. Fourteen different profiles for assigning user permissions are available, but these rights are set for all client folders. Although each client can be

protected with a unique password, the user rights settings do not permit folder-level

technical support and product updates. The Company charges 25% of the initial purchase price for support and maintenance in each subsequent year.

2013 Ratings:

Core Product Functions/Features: 4.75 Stars
Integration/Data Export/Import: 4.5 Stars
Advanced Functionality: 3.5 Stars

2013 Overall Rating: 4.25 Stars

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