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Intuit — Lacerte/ProSeries Document Management System

2011 OVERALL RATING ★★★★★



CORE PRODUCT FUNCTIONS/FEATURES



INTEGRATION



ADVANCED FUNCTIONALITY

800-765-7777

<http://lacerte.intuit.com/products/tax/document-management-system>

<http://proseries.intuit.com/products/dms>

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Strengths:

- Pre-defined, but customizable folder structure to streamline client setup
- Direct upload of client lists from the ProSeries & Lacerte tax systems
- Ability to manage the storage of non-client files
- Granular permission setting rules at the individual user level

Potential Limitations:

- Not available as a web hosted solution
- Lack of an integrated document portal

Product Delivery Methods:

☒ On-Premises

☐ SaaS

☐ Hosted by Vendor

Executive Summary & Pricing

Intuit continues its march towards being a single source of applications for running a small accounting and tax practice. If you are satisfied with the ProSeries or Lacerte tax programs, then you should be pleasantly surprised by the scope of features and functions in the integrated DMS at a price of \$450 per year for ProSeries users and for \$249 as part of the Lacerte productivity plus bundle that includes the Lacerte Tax Analyzer, Tax Planner and DMS.

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