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Lacerte tax, an Intuit ProLine Solution

2011 OVERALL RATING 



CORE PRODUCT FUNCTIONS/FEATURES



INTEGRATION



PAPERLESS WORKFLOW



REMOTE CAPABILITIES

2011 OVERALL RATING 4.50

800-765-7777

www.proline.lacertesoftware.com

Product delivery methods:

☒ On-Premises

☒ SaaS

☐ Hosted by Vendor

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- ProLine Tax Import offers a website to help users download and import securities transaction data from investment banks
- Pay-per-return option attractive for startup firms & those who need advanced functionality without a large up-front payment
- New organizer for trust returns, support for using organizer as a workpaper
- This year's version adds e-filing for state partnership & corporate tax in 23 jurisdictions
- Excellent QuickBooks integration with Lacerte SmartMap tool

POTENTIAL WEAKNESSES:

- Lack of a vendor-hosted or SaaS version of this product, although some third-party hosting companies offer this service
- Client Tracker is not compatible with Windows Vista/Windows 7
- Some supporting applications in the suite are very new (ProLine Practice Management & ProLine Tax Research), and not as complete as the more established competitor products
- Other products (EasyAcct write-up solution) have limited adoption & enhancements

EXECUTIVE SUMMARY & PRICING:

Lacerte Tax can handle a wide range of tax compliance issues and is intended for firms with a complex client base, high-return volume or those who are reliant on its extensive QuickBooks product integration. Pricing has been streamlined, and, for the second year, bundle-based discounts of groups of Intuit practitioner tools are being offered. All bundles include document management solutions as well as entry-level tax planning. Bundles include a various mix of individual and business return modules and range in price from \$5,049 to \$12,949. Modules may be purchased

separately, with business modules starting at \$1,579. Per-return-pricing is also

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- • Analytical review
- • Electronic filing

4.25 – INTEGRATION

- • w/in publisher's own suite
- • w/tax research tools & guidance
- • w/other or external programs
- • w/practice management
- • w/external services

4.5 – PAPERLESS WORKFLOW

- • paperless creation
- • paperless open items
- • paperless review
- • access control for limiting access into returns
- • digital document storage/mgmt.
- • data import/output

4 – REMOTE CAPABILITIES

- portal
- remotes access
- 1099 depot
- Outsourced document prep
- Hosting
- Web-based

Software

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