

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

## Thomson Reuters — Source Document Processing

**2011 OVERALL RATING** ★★★★★



CORE PRODUCT FUNCTIONS/FEATURES



PAPERLESS WORKFLOW



INTEGRATION



HELP/SUPPORT/TRAINING

800-968-8900

CS.ThomsonReuters.com

2011 Overall Rating 4.5

**Best Fit**

- Firms who use the related Thomson Reuters applications (FileCabinet CS and

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

through entity tax preparation applications.

- Requires firms to use FileCabinet CS, which must be used instead of Adobe Acrobat to annotate and reference source documents.
- Unlike many of its competitors, Thomson Reuters does not sell an Adobe Acrobat extension to assist practitioners with creation of workpapers.
- The application does not support any third-party solutions for document management or tax preparation.

## Strengths

- The least expensive scan, organize and populate tool reviewed here, at \$6/return.
- Strong integration throughout the CS Professional Suite applications, including automatic search and import of tax data from the payroll, write-up and flow-through entity tax preparation applications.

## Potential Limitations

- Requires firms to use FileCabinet CS, which must be used instead of Adobe Acrobat to annotate and reference source documents.
- Unlike many of its competitors, Thomson Reuters does not sell an Adobe Acrobat extension to assist practitioners with creation of workpapers.
- The application does not support any third-party solutions for document management or tax preparation.

## Executive Summary & Pricing

At \$6 per return per year, the UltraTax CS Source Document Processing Service is one of the least expensive tools reviewed. Thomson Reuters also offered UltraTax CS users a “free day” during March 2011, where users could try out the service by processing as many returns as they could submit during that day.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

## **Help/Support/Training – 4**

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved