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Mary Girsch-Bock • Aug. 18, 2017



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### From the [2017 Review of Professional Tax Preparation Systems](#).

TaxSlayer Pro's menu looks slightly dated, though even new users will find it easy to navigate. A colorful menu bar at the top of the screen offers quick access to all system functions. Data entry screens mirror the tax form being processed, with a vertical menu to the left of the data entry screen offering quick access to various areas of the form being processed. The Business Package menu is a pared down version of the main menu with many of the same options. A form finder menu at the bottom left side of the screen offers a quick list and easy access to all available business forms.

Mentioned earlier, all versions of TaxSlayer Pro support 1040 federal and state forms, as well as local tax forms when necessary. The Business Suite also supports forms 706, 709, 990, 1041, 1065, 1120, 1120s, and 5500.

TaxSlayer Pro offers unlimited e-Filing for both federal and state forms, with users able to print a report that produces a list of all returns/clients that have returns e-Filed. The addition of the new TaxSlayer Pro Mobile App is available in both the Premium and Web versions of the product. The app, called TaxesToGo, is designed to eliminate the need for an office visit or endless emails. Taxes to Go does the work of a portal, allowing clients to enter all relevant data on their iOS or Android device and upload the detail directly to a secure portal. Once the information is received, the tax information entered in the app can be used to automatically prepare tax returns. Once the return is complete, users can then send the completed form back to the client, who can then use the Signature Pad feature to sign the completed form using their mobile device. Clients can also access the status of their return using the Tax Status Now option.

The PaperCut Paperless Office is available in TaxSlayer Pro Premium, and allows users to save and print returns as PDF's. Users can also export these PDF's if necessary. The application also allows users to scan and save all client documents

that have been submitted, such as W-2's, 1099's, notes, and image files. Paperless

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and promotional flyers. Integration with Signature Pad, mentioned earlier, allows clients to easily sign forms using a mobile app.

TaxSlayer Pro also offers integration with a variety of bank products that offer electronic banking services to firm clients, including electronic refund checks. Clients can also pay tax preparer fees directly from their return using the banking products.

TaxSlayer Pro offers excellent help functionality, with users able to access product help from the menu bar at the top of the screen. The Support Center offers quick access to product support, offers users the ability to ask a question online, submit a support ticket, contact support via email, and access product videos including Getting Started videos. Various IRS and state tax resources are also available online.

Available in three editions; Classic, Premium, and Web, TaxSlayer Pro is a good fit for small to mid-sized firms that process a significant number of tax returns for clients. The Classic version is \$1,095 and includes both individual and business tax returns and unlimited e-filing. The Premium and Web versions also support the new mobile app. Both the Premium and Web editions run \$1,395, though the Web version only supports individual tax returns.

## 2017 Rating – 4.50 Stars

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