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Mary Girsch-Bock • Aug. 18, 2017



THOMSON REUTERS

Ultra Tax CS

Thomson Reuters

UltraTax CS from Thomson Reuters is well suited for larger, full-service accounting firms that are looking for a scalable application that offers solid paperless options. Though UltraTax CS can be used as a stand-alone product, it is far more productive when used with other applications in the CS Professional Suite of products.

From the **2017 Review of Professional Tax Preparation Systems**

UltraTax CS offers a variety of deployment methods, including desktop and network

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quickly. Users can easily toggle between screens, and even display tax forms to their clients on a separate monitor if desired.

The NetClient CS Portal offers firms the ability to deliver completed returns directly to clients electronically in a secure fashion. Clients can also use the portal to enter tax information online using the Web Client Organizer. Clients also have anytime access to completed tax returns and other related documents via the portal.

For firms looking for paperless electronic processing, the optional FileCabinet CS can organize electronic documents, storing them securely until users are ready to access them. Thomson Reuters now also offers a fully web-based (browser-based with no local installation) document management solution, Onvio Documents, which integrates with UltraTax CS in the same fashion as FileCabinet CS. Although it is mentioned below in the section for other integrated applications, it's probably most relevantly mentioned in the context of document management The Source Document Processing Service in FileCabinet CS allows users to scan client source documents and upload them to the server where they are labeled and organized into folders. When processing that client's tax return, simply open the client file where the documents are stored in order to populate input screens with the previously saved data.

Those using other applications in the CS Professional Suite of products will reap the benefits of the seamless integration available. UltraTax CS integrates with Accounting CS, Accounting CS Payroll, Checkpoint, FileCabinet CS, Fixed Assets CS, GoFileRoom, NetClient CS, Onvio Documents, Planner CS, Practice CS, and Workpapers CS creating an all-encompassing system that offers tax planning, tax preparation, practice management, document management, client portals and document management capability.

UltraTax CS also integration with Microsoft applications such as Excel and Word,

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UltraTax CS is an excellent application that is well-suited for accounting firms that have a mix of business and individual clients with increasingly complex needs. The functionality added by the seamless integration available to CS Professional Suite makes the scope of the product unlikely to be easily matched. Pricing for UltraTax CS varies, with final product pricing based on the number of users and the number of modules purchased, with the product commonly starting at around \$3,000 for a single user. Product support is included in the final product price

2017 Rating – 5 Stars

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