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software: Basic, for small practices focusing only on 1040 preparation; Express, for firms with a high volume of bank products; and the Professional version, which provides a suite of modules for 1040, 1041, 1120/1120S, 1065, 990, 706 and 709 compliance. The company offers the modules individually or in bundled packages, such as the Power bundle for \$3,999, which includes all return preparation modules and includes the right to use the program on all workstations within an office as well as on laptops and home computers of the staff of that office.

E-filing is not included in the purchase price, but is available for \$3 per federal, \$2 per state; or in an unlimited package for \$250 for unlimited Individual E-filing (free if returning customers renew and pay by June 15) and \$100 for unlimited Business E-filing. ProSeries is also available on a pay-per-return basis.

Learning Curve – 4.5 Stars

ProSeries opens to a multi-paned screen called the Home Base, which primarily offers a client list spreadsheet that includes sortable columns of multiple client data. The client list can be filtered to include all tax types or only clients with specific primary forms. Also available from the Home Base is a Help Search field; tips on performing specific tasks; the Message Center, which provides information on software and product updates; and the program icon bar and pull-down menus. Client returns open within a master panel that shows the active data-entry sheet or form. Additional forms and data-entry sheets are accessible via a menu on the left that divides the form activity into categories, but also allows jumping directly to specific forms, schedules and worksheets. This menu offers a variety of views, including viewing by form number/name, viewing by activity description, viewing only the forms currently in use for the client, and a list that can be customized to show frequently used documents.

Data entry is available in a Quick Entry or Forms-based mode, but actual data entry

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Use/Workflow & Productivity Tools – 5 Stars

ProSeries includes several features on or easily accessible from the Home Base screen that aid in streamlining workflow, including the aforementioned Message Center, which works with the Task Scheduler to automatically check for and download program updates, and also Help functions and tips. The data-entry sections are well designed, allowing easy access to forms and schedules, and provide AutoEntry on some fields, requiring the user to enter only the first few letters of a common entry such as cities while the system completes the entry. During data entry, the system allows users to attach notes to any field or to mark entries as estimated or as missing. ProSeries includes a new feature for managing missing client information and keeps track of these items in a report while offering integration with e-mail to allow you to send a customizable reminder notice to the client with the missing information. The program can be set to open a dialog box when a client return with missing information is opened. This box allows you to note what is needed and provides a check box for noting when the item has been completed.

The system makes calculations in real-time and distributes data throughout a client's federal and state returns as necessary, as well as with other related forms and returns. (K-1 Import has not been available in past versions of ProSeries, but the company is working on it for next year.) A one-page summary of tax information is available by clicking the Summary icon in the toolbar. While in the forms view, clicking on calculated entries allows drilling down to the source schedule or worksheet from which the calculation was derived. The system also allows overriding of calculated entries, after which the entry is color-coded in red to denote the override. A list of overrides and field notes can be printed for each client or viewed on-screen during the program's review process.

The ProSeries billing utility includes a basic billing clock that can monitor total time

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and provides support for calendaring functions, contact management, and enhanced reporting, invoicing and letter-writing capabilities. ProSeries also offers a fixed asset management system.

Integration/Import & Export – 5 Stars

ProSeries directly integrates with QuickBooks, including the Pro and Premier versions, and can import data from several other accounting systems. It can also import data from Intuit's trial balance and fixed assets management programs. The program shares data throughout its modules as necessary. ProSeries also supports printing returns to *.PDF.

Support/Training & Help System – 4.5 Stars

ProSeries includes a very strong help utility called the Help Center that includes plain language searching of the help database, tips about how to perform specific tasks, tutorials, and line-specific help from any form line as well easy access to IRS instructions. The company offers webinars and live update seminars, and online and phone-based support is available with extended hours during tax season.

Product Evolution& Vendor Vision – 5 Stars

Intuit has continued to develop and market its two primary professional tax products, ProSeries and Lacerte, to a slightly different target, with Lacerte geared more toward larger professional practices. As such, they have continued to offer additional features and services with ProSeries that attempt to tailor it to small and mid-sized practices, particularly with the program's deep integration with bank products. However, ProSeries also has some high-end capabilities, including good

integration between program modules, excellent client management features and

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ProSeries offers a strong program with excellent productivity features, such as its ability to integrate with e-mail to retrieve missing client information, as well as a well-structured design that streamlines workflow. The system is module based, allowing practitioners to pick and choose the form support they need and use pay-per-return if a need arises mid-season. Pro-Series is moderately priced and would be a good fit for mid-sized or smaller firms, especially those using products with which the program integrates. Keep in mind that the price does not include e-file transmission fees, so firms need to determine a good estimate of the number of returns anticipated in order to estimate their actual price.

2005 Overall Rating – 4.5 Stars

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