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*From the April/May 2006 [Review of Document Management Systems](#)*

This application is designed primarily as an add-on application for the Lacerte tax preparation software. As such, its value is significantly increased if you are using both applications. Lacerte DMS is very simple in its design and is a practical solution for the small firm or sole practitioner.

#### **Installation & Configuration — 4 Stars**

Lacerte DMS is designed as a desktop application and utilizes a database for storing the document files. The database can be configured for storage on the local PC or as a shared database on a network server. In either configuration, the software is installed on each computer. There are no specific hardware requirements

beyond a typical Windows-based software application, other than extended storage capacity.

#### **User Interface — 4 Stars**

The interface follows the same look and feel as the Lacerte tax software interface. The organization of document files is client centric. Each client has a folder structure established, similar to Windows Explorer folders. Folder templates can be established and assigned to clients as appropriate. In addition to the documents, each client folder has a client information tab and an issues tab. A third-party application serves as a built-in \*.PDF viewer, which allows you to view \*.PDF files and apply annotations. This tool also provides integration with any MAPI-compliant e-mail system. Documents can be sent with or without annotations. The scan window allows you to view a scanned document in

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### **Training & Support — 4 Stars**

The services provided by Lacerte are appropriate for this relatively simplistic system. Support is handled by the same group that provides Lacerte's tax software support. Telephone and e-mail support are available. Training is delivered via webinar presentations.

### **Workflow & Document Tracking — N/A Stars**

Lacerte DMS is not currently designed to provide workflow automation. As a result, there is nothing to evaluate in this category.

### **Security — 4 Stars**

A database-level password is the first line of security. In addition, each client can have a unique password applied to his or her files. Individual users can be assigned various rights to access, edit and delete documents. An optional activity log tracks activity by type, user, date and time.

### **Pricing — 5 Stars**

Perhaps the most compelling feature of Lacerte DMS is the pricing. A single annual fee of \$450, regardless of the number of users, makes it one of the most affordable solutions reviewed here.

### **Relative Value — 4 Stars**

If you are a small firm or sole practitioner already using Lacerte or Intuit's ProSeries tax software, this solution should be given serious consideration. If you are using another tax software solution, the simplicity of this system makes it a viable alternative for small firms. However, it is limited in its integration capabilities.

### **2006 Overall Rating — 4 Stars**

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