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*From*  
*the August 2007 Review of Document Storage Systems*

These two products are essentially the same. One is designed to integrate directly with the Intuit ProSeries tax software, and the other version integrates with the Lacerte tax software.

#### **Usability — 4 Stars**

The application can be accessed from an icon on the tax software toolbar or from a desktop icon. The interface is based on displaying a client list on the left side of the screen to access the related documents. Three tabs are available from which to choose: Documents & Folders (to access documents organized in folders), Client Information (which provides access to a collection of client contact information), and the Issues tab (which displays a list of open issues or tasks related to the selected client).

#### **Document Organization — 4 Stars**

Documents are organized in a series of standard folders for each client. The standard folders include Correspondence, Permanent Files and TY06 (tax year). Within the TY06 tax folder, the subfolders include Organizer, Source Documents, Tax Plan Reports and Tax Returns. This folder structure can be customized for all clients or for individual clients.

#### **Annotation — 5 Stars**

The system allows annotation to be handled with a series of proprietary tools such as highlighting, drawing, stamps and images. Adobe Acrobat can also be utilized, but keep in mind that it will require an additional cost and really isn't necessary.

## Integration — 4 Stars

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## Records Management — 4 Stars

Security is established by assigning user-level rights, including database access, delete, edit documents, edit client and folder list, export documents, edit or delete the activity logs, and edit the folder templates. The activity log tracks what activities were performed in the system, by whom and the date of the activity.

## Relative Value — 4 Stars

The Lacerte/ProSeries Document Management Systems are simple and cost-effective document management solutions that are particularly suited to practitioners using these tax programs. Pricing for the Lacerte Document Management System is \$600, regardless of the number of users. The annual maintenance fee is \$150. The ProSeries Document Management System is \$450, regardless of the number of users. There is no annual maintenance fee. Toll-free technical support is included at no additional charge. Web-based training during the first year is also provided at no charge.

## 2007 Overall Rating: 4 Stars

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