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Thomson Tax & Accounting — Quickfinder Tax Manager

800-323-8724, option 1 www.quickfinder.com/taxmanager

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From the Jan./Mar. 2008 [Review of Tax Research Systems](#)

Thomson, which offers high-end comprehensive research systems like Checkpoint and is a premier developer of tax and financial analysis, recently announced the release of a new online tax research system geared toward small and single-person

tax and accounting practices. The Quickfinder name has been around for about 35 years, providing tax quick reference handbooks and finding aids in print, CD-ROM and online formats. But the new Quickfinder Tax Manager online research system gives professionals in-depth access to 1040 and small business tax topics, including primary source materials and expert guidance. Pricing for Quickfinder Tax Manager starts at \$495 for a single user, inclusive of all primary source content, analysis, planning guides and practice tools.

EASE-OF-USE/SEARCH ROUTINE — 5 Stars

The system is web-based, with the initial screen providing the user with tabs for Research, Newsstand and Tools. The system defaults to the tab of the user's preference. Primary search functions are performed from the Research tab, which provides very simple and intuitive functions, breaking searches into just a few steps: Enter keyword, select source material from which to search, and then

click the Search button. Advanced query options are also available, giving users more filtering tools, a lookup list of recent search terms, and providing a list of connector phrases (and, or, exclude, etc.). The search function also includes a thesaurus and spell-check option.

Find by Citation search templates provide links to locate specific documents from resources including codes and regulations, cases, rulings and IRS publications and Circular 230. Users can also jump to e-FormRS for online forms access, or to the all new and exclusive Bridge-It search tool, which lets users move from any tab, topic or subtopic in the 1040 and Small Business Quickfinder handbooks to more detailed analysis in the Tax Manager system without having to use detailed keywords or phrases.

Search results are provided in a condensed list organized by the source of hits (primary source or editorial analysis) and noting the specific reference documents. Users can choose to search further from within these results or can set the screen to show a table of contents view. Specific documents are displayed with various tools and other options in a panel on the left, and keywords and phrases are highlighted within the text. The search functions and tools are very similar to those found in Thomson's high-end Checkpoint research system, with print, export, e-mail and text-view options easily accessible.

CONTENT — 4 Stars

In addition to Quickfinder Tax Manager Analysis content, the primary resource materials that can be searched via Quickfinder Tax Manager include tax planning and practice guides, current Internal Revenue Code with index, federal tax cases, final/temporary/proposed IRS & Treasury Regulations, IRS publications/rulings/releases, and Circular 230. The system also includes the Quickfinder Tax Manager Newsletter and daily PPC Five-Minute Tax Briefings, and users receive print copies of the 1040 Quickfinder Handbook and Small Business Quickfinder Handbook. Tax Manager also includes numerous financial and tax calculators, including auto, business, credit card, investment, loan, mortgage and retirement. On the Newsstand tab, users can view the Tax Manager Newsletter and Five-Minute Briefings, as well as set options for receiving these items by e-mail in addition to online. More than 100 calculators and the Bridge-It tool are located on the Tools tab. Access to e-FormRS is offered as an add-on for \$200, providing a comprehensive online library of federal and state tax forms.

CUSTOMIZATION — 4 Stars

Quickfinder Tax Manager is a simplified research system that remains very user-friendly

and provides basic customization options, such as letting the user select which of the three tabbed views to use as the default screen, along with options for displaying results, managing e-mail, and export options. Search queries are automatically saved into a “recent keywords” list, from which they can be reused or tweaked as needed.

INTEGRATION/OUTPUT — 4 Stars

Tax Manager does not provide direct integration with tax programs. However, because it is designed for use by smaller tax and accounting practices, it does offer simple cut-and-paste options, along with the ability to output research materials to Word, HTML and plain text, or to e-mail them from within the system.

SUPPORT & UPDATES — 4.5 Stars

The online system includes a somewhat traditional indexed Help utility with search functionality and tips on performing searches and using the program’s Newsstand. Quickfinder Tax Manager is geared towards sole practitioners and very small firms who probably don’t perform research on a daily basis.

The system is exceptionally easy to learn and understand and, while it doesn’t necessarily have the breadth of content as other systems, it’s target audience will be well served by its resources and affordability. Online and technical support are included in the price of the program.

2008 Overall Rating: 4 Stars

Article

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