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Orrtax Software — IntelliTax

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of [Tax Compliance Suites](#)*

Orrtax offers several bundled versions of its IntelliTax system for professional preparers, from a 1040-focused bundle to a complete individual and business suite as well as an option for practices with multiple offices. The systems all include e-filing, and Orrtax offers several integrated bank products and loan features. Depending upon the IntelliTax bundle, the program offers compliance support for individual, corporate, S-Corp, partnership and fiduciary returns. The company also offers several add-on applications to give tax practices added revenue streams, including the warranty-like SafetyNet audit protection plan; the InfoPrompt phone-based automated, bilingual return status information system; Vertical Lend for mortgage products; and XpressCash for offering payday loans. The Essentials system, which provides 1040 preparation software and e-filing, costs \$995 and gives users access to the business entities on a pay-per-return basis. At \$1,495, IntelliTax Expert provides 1040, 1065, 1120, 1120S and 1041 compliance with unlimited e-filing. The Enterprise system costs \$1,995 and includes all entities plus remote access and multi-office capabilities.

General Operations/ Ease-of-Use — 5 Stars

The IntelliTax interface offers a clean and intuitive design with traditional icons across the top of the main screen, which resembles a web browser and actually can be used as one, with a web address bar and browser navigation buttons. By

default, the main work area (the browser window) opens to the Launch Pad, a box-based menu that offers icons for the most common program features, such as starting or opening returns, transmitting e-file returns, printing checks, accessing reports, viewing client profiles, downloading updates or using support options. The Launch Pad also has links to third-party add-on services, including iHost and [Pay1040.com](https://www.pay1040.com).

The bottom of the menu displays links to the IRS website, official forms, state tax entities and other tax resources. While each of these website links opens within the main screen, the program-specific functions, such as working with returns and the report center, open within a separate window. Users can access a comprehensive client selection screen at any time using the Client Profile icon on the main toolbar, which opens the system into a multi-paned view that includes a spreadsheet list of returns with the ability to filter by type of entity using a menu on the left. The program also allows searching by TIN, name, phone number or invoice, and provides a detailed profile selection below the client list. When a client is highlighted, this profile section immediately shows a breakdown of virtually all return information, including refund, prep fees, check numbers, e-filing fees, transmittal date, acknowledgements and other information, and it provides tabs for viewing specific data regarding Client Info, Federal Filing, State Filing, RAL Bank, Fees/Refund and Comments. This allows a full overview of any client's return even while working within a different client's files.

When working with a client return, the interface of the return window provides text-based links for the various data-entry tasks and directly accessing forms, with a vertical menu on the left for moving between forms and data-entry areas, a tax summary, billing/invoicing and other functions. Data entry can be performed either on interview-based worksheets or form replicas, both of which include field-specific instructions, popup calculators and smart ZIP Code entry, with all data moving to forms as necessary. Calculations are automatically performed, including withholding for SSI and Medicare. Forms and worksheets include drilldown access as well as the ability to add W-2s, 1099s, 1098s, K-1s and other forms simply by clicking on the appropriate field on the primary return. Even though the program moves between a few interfaces, IntelliTax provides a very intuitive environment that is a quick learn and aids in workflow.

Workflow & Productivity Tools — 3.5 Stars

IntelliTax provides good guidance in processing returns, from creation through filing and invoicing functions. It includes added features such as a basic fixed asset depreciation module and managerial reporting focused on practice management, billing and bank products. With drilldown functions from each line, a review checklist and the ability to add notes to any data-entry field, the program makes basic review processes fairly simple and also provides an automated diagnostics system accessible via the Review Return icon, which points out potential inaccuracies, missing information and other potential problems. The program allows overriding of calculated amounts but tracks all return activity with an audit trail feature that provides added managerial supervision. The IntelliTax SnapShot feature makes it easy to provide a quick refund estimate to clients based on estimated data entry (or last paystub data), along with an estimated timeframe in which to expect the refund proceeds.

Integration/ Import & Export — 3 Stars

Data is shared as necessary between the business and individual income tax modules, providing automatic population of related returns and K-1 pass-throughs. Additionally, all forms, client letters, reports and worksheets can be generated as PDF documents. The program's Launch Pad includes links to the IRS and state agencies, but no integrated research options are available.

Support/Training & Help System — 4 Stars

Line-by-line instructions are available, and the program's Help utility provides good general assistance, while the guided interview mode provides very simple processing. IntelliTax users receive a printed Getting Started Guide in addition to access to the company's online support website, which includes FAQs, tutorials and other options. Orrtax offers live and web-based training, and technical support is included in program pricing.

Relative Value — 4 Stars

The IntelliTax system is easy to use and provides good Help and guidance features, which, along with strong banking and e-filing options, make it a good fit for small and mid-sized practices with primarily 1040 clients, but that also need some support for business entities. The program's remote office capabilities

also make it useful for practices that are considering the addition of retail store preparation locations.

2008 Overall Rating: 4 Stars

Intuit, Inc. • Article

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