is a DOS-based version of
its 1040 system; multi-office management through its IntelliManager product; and IntelliTax for Business for professional tax preparation of 1041, 1120, 1120S and 1065. Although available separately, these modules work through the same interface. The company also offers bank product support, practice management and billing applications, as well as 1040 marketing tools. The IntelliTax for Windows system includes client organizers, checklists and a client letter that is available in Spanish and English. Marketing materials, demo guides, tutorials and presentation CDs for IntelliTax for Windows Intelli- Tax Classic and IntelliManager are also available in Spanish and English. The individual preparation system costs $495 (discounts are available); the business and fiduciary module is $595. The business and one professional system, along with other add-ons, is available as the SuperSystem for $1,495.

Learning Curve – 4.5 Stars
The user interface for
IntelliTax for Windows provides the option of using the Client Profile or the Launch Pad, which displays program feature icons, as well as links to additional products and IRS sources. This design provides easy access to the program's primary functions, such as accessing client returns,
e-filing, reporting options and printing functions. Client returns can be opened from either the Open Return function, which only offers SSN lookup capabilities, or from the Client Profile screen, which provides much more robust client selection options, including filtering, searching and on-screen summaries to virtually all client information, including return status, refund/due amount, acknowledgements, billing data, return data summary and bank product information. When within a client return, the system offers a Home Page that acts as a checklist for return preparation, and a menu on the left that provides shortcuts to specific data-entry areas for a client return. Data entry can be performed in either form or interview

sheet modes. Overall, the program is easy to understand, with intuitive icons and

page for a client file. Within client returns, data entry is simplified by the ability to toggle between form and interview modes, or to utilize the split-screen mode, which offers both, allowing users more comfortable with the form to also have the support of the interview mode.

IntelliTax for Windows also incorporates data-entry features such as automated fill-in of city, state and county data after filling in the ZIP code. When within either data-entry mode, the system allows direct entry of data into the fields, and also offers links from each form line to supporting schedules, forms and worksheets. A Back browser button eases returning to the original document after moving from it. Data can be overridden, in which case the system uses a color-coding format to readily identify overridden fields. These overrides are also noted during the review process, as is an overrides report. IntelliTax also offers the ability to flag, bookmark or attach notes to virtually any entry or form line. These entries are also brought to the user's attention during review. Form instructions and field-specific help are also available by right-clicking on any entry field.

The Review Return function, available from the icon bar and the return Home Page, guides users through a review checklist, identifying potential errors, missing information, overrides and other potential concerns with the return and allows users to correct errors right on the form, all within a single screen. The system's report center includes more than 80 customizable reports for practice management, billing, bank products and e-filing. Also available are customizable automated client letters and invoices. Among new features for TY2004, an Asset Center was added to IntelliTax, providing a centralized location for asset management, including access to all asset-related worksheets. Also new, the IntelliManager function better enables multi-office use of the program, allowing control and management from a main office.

Integration/Import & Export – 3.5 Stars

The system's built-in help utility is very well implemented, with good right-click access to Help and instructions, as well as access to support bulletins and program updates. In addition to print and web-based newsletters that keep users informed of tax law changes, deadlines and program feature tips, Orrtax offers traditional phone-based support and an ample selection of web-based help that includes FAQs, downloadable updates and other items. Orrtax offers several training options.

Product Evolution & Vendor Vision – 4 Stars
Orrtax has shown a strengthened commitment to its IntelliTax line through continued development of features such as the Asset Center. The dual language client letter can especially be a benefit and potentially open up new markets for some practitioners.

Relative Value – 4.5 Stars
IntelliTax for Windows provides a very user-friendly professional application with support for most entities with a year-end reporting requirement. The user interface option centered around the Client Profile screen provides an excellent system for managing client returns, especially for firms with a strong use of bank products.
While IntelliTax for Windows is best suited
to small and mid-sized
single-office practices, the system's new IntelliManager program gives support to multi-office, service bureau and franchise environments, enabling client and return management, control, program administration and reporting functions from a central location.

2005 Overall Rating – 4.5 Stars

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy

(NASBA) as a sponsor of continuing professional education on the National Registry of CPE