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## *Products*

TaxSlayer Pro has been around since the late 1980s, when the system was initially developed by an accounting and tax firm for internal use at its multiple offices. Within a few years, it was offered to other practices, and has since grown a loyal user base attracted to its all-inclusive pricing, multi-state capabilities and friendly user interface. While the system is primarily focused on smaller tax practices serving the compliance needs of individuals and small business clients, it also includes full compliance support for all taxed entities at the federal and state level. Support for Puerto Rico individual returns is also included.

Over recent years, the vendor has continued to enhance the system through inclusion of free unlimited e-filing, a depreciation module, bank products and other features, and now offers two versions: TaxSlayer Pro Classic and TaxSlayer Pro Premium. The new Premium edition adds functions for paperless document management and storage, a tax office assistant feature, mobile managerial reporting access and other functions. The Classic version costs \$895, and Premium is \$995 for licenses that support any number of users at one office or location; additional locations and offices are available at a reduced cost. The company also offers TaxSlayer Books, a client accounting solution, and options that enable tax professionals to offer financial services.

## **General Operations/Ease-of-Use – 4.5 Stars**

The interface for TaxSlayer Pro was redesigned a couple of years ago, providing an easy-to-navigate system with menu structures that allow users to work with either their mouse or the keyboard only. The system opens to the main menu, which provides quick access to function for working with individual or other entity returns, e-filing, print tasks, reports and other areas of the program, while icons at the top of

the screen also provide access to key modules, such as the Client Status Center, Help

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taxes, payments and miscellaneous. A navigation menu is provided to the left, along with a Form Finder that enables quick jumping to any form, or a view of only those forms associated with the current return.

Calculations are performed as data is entered, with automatic entry of FICA on W-2s, and transfer of data between associated forms and worksheets. While forms-based entry is not offered, the system does offer a quick view feature. TaxSlayer Pro's data-entry worksheets include drilldown access to supporting documents. Additionally, the system includes ZIP Code-based auto entry of city and state information. Navigation throughout the program is simple and intuitive, and includes multiple "hot key" options.

### **Workflow & Productivity Tools – 4 Stars**

TaxSlayer Pro is designed for smaller practices, so its workflow tools are generally geared toward the needs of such professionals. As such, the system does not provide extensive collaboration tools, but does provide a really nice appointment scheduling system that can display multiple preparers' calendars through various timeframes. Additionally, management of electronically filed returns is simplified by the messaging center, which automatically checks for IRS acknowledgements and bank product notices, as well as alerting the user to program updates and messages from support. For review purposes, TaxSlayer Pro includes diagnostic functions and IRS reject code information, along with the ability to add notes to client returns.

The system includes a billing function that lets a firm either set fixed pricing for any form or service or bill on an hourly basis, with time spent within a return automatically tracked and displayed on return screens and in the client selection list. The billing system also allows for fees based on a client's previous year, and the generation and tracking of sales tax associated with preparation services. When closing out of a return, total fees associated with the client are calculated, and users can set the program to automatically print a receipt. TaxSlayer Pro's reports, which

include YTD totals, dailies, preparer totals and others, can be accessed remotely by

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The TaxSlayer Pro system can pull data from the vendor's client-side bookkeeping software, and the document management system, backup and text messaging modules directly integrate with the tax program. Returns can be saved to PDF format. Data import from external systems is not supported. A library of publications, form instructions and print-ready forms is included with the program, but no additional research tools are available.

### **Support/Training & Help System – 4 Stars**

TaxSlayer Pro is easy to use and should require no training. The program provides a task-sensitive Help guide along with easy to understand diagnostics. The main Help Center offers access to the vendor's online support site, user forums, the user manual and links to the IRS and bank product provider. Phone and email support is included with pricing.

### **Relative Value – 4 Stars**

The addition of document management, backup, remote reporting, scheduling and text messaging features fills out TaxSlayer Pro for smaller firms needing a basic, but comprehensive package that allows for quick learning and simplified paper and e-filing of primarily individual returns.

### **2009 OVERALL RATING:**

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