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2012 Review of Intuit – Tax Research for Lacerte and ProSeries

Nov. 26, 2012

Intuit – Tax Research for Lacerte & ProSeries
800-200-7599

lacerte.intuit.com/products/tax-research

proseries.intuit.com/products/tax-research

From the Dec. [2012 review of tax research](#) systems.

BEST FIT: Tax firms that currently use Intuit's Lacerte and/or ProSeries tax solutions.

STRENGTHS:

- No additional fees for multiple users
- Uses Google's Search Engine
- Access to Intuit's online forum for Lacerte and ProSeries users
- Direct integration with Lacerte and ProSeries

POTENTIAL LIMITATIONS:

- No support for multiple logins
- Limited exporting capabilities

Intuit offers a tax research solution for its Lacerte and ProSeries solutions. Intuit Tax Research integrates directly into the two programs. The application uses the Google

Search Engine to research content. Articles can be attached to client returns easily and users have access to various content provided by BNA.

Basic System Functions: 4.75 Stars

Intuit Tax Research is Intuit's web-based tax research solution that integrates directly within Lacerte and ProSeries, allowing users to conduct research directly from the programs. Even though Intuit Tax Research integrates directly within Lacerte and ProSeries, users of other tax preparation solutions can still access the application through any web browser. Intuit Tax Research is also available on mobile devices.

Intuit Tax Research gives subscribers access to more than 1.5 million documents, such as primary code, state regulations, publications, IRS information, news releases and federal and state court cases. The tax research content for Intuit Tax Research is provided by BNA. The solution uses Google's Search Engine to research content and filter the results.

Content: 4.25 Stars

Intuit Tax Research uses Google Search Engine to search content provided by BNA. Users have access to content from the Internal Revenue Code, regulations, federal and state court cases, publications, rulings and BNA analysis. Users can also ask questions to other Lacerte and ProSeries users through Intuit Tax Research online community.

When users perform a search, the results display in a separate window with general category listings. On the left screen, category listings and the number of search terms are displayed while the middle screen displays the Google Search Engine results and the right screen shows results from Intuit's online forums. Selected articles open in an embedded window with the search results located at the bottom of the article.

Additionally, Intuit Tax Research provides customizable client letter templates for various tax situations. Users can send the letters directly to clients.

Customization: 4 Stars

Intuit Tax Research doesn't support multiple user logins, so customization is limited and not specific to users but rather the entire practice. Users can also filter results using Google's Search Engine.

Integration/Import/Export: 4 Stars

Intuit Tax Research directly integrates with Lacerte and ProSeries and is accessible from each screen within the products. Users can print articles to directly to paper or use the print to PDF function to create PDF documents. Documents can also be exported using Lacerte and ProSeries document management software solutions. Research documents can be attached to tax returns and set to roll forward with the return for up to seven years.

Help & Support: 4.75 Stars

Intuit's website houses the Resource Center where users have access to help and support via phone, chat and email. The Resource Center also features How-To videos and a link to Intuit's exclusive online forum where users can ask questions and receive feedback from other Lacerte and ProSeries users.

In addition, once a user license is acquired, users receive an introductory webinar and are assigned a support contact person. Webinars and other training options are available for users to work through at their own speed. Intuit automatically updates the research content so users don't have to install or download any updates.

Summary & Pricing

Intuit Tax Research for Lacerte and ProSeries is a tax and research solution designed specifically for Intuit's Lacerte and ProSeries applications. Intuit Tax Research is directly integrated into these programs and available in three subscription levels – unlimited annual, unlimited seasonal and pay-per-use. The annual subscription is available for \$849 and the seasonal subscription for \$449.

The seasonal option allows firms to use the solution from April 16 to October 14. Both options allow unlimited searches and attachments to client returns and do not have a fee increase for additional users. The pay-per-use option is available for \$19.95 per use and includes printing, saving and attaching up to four articles per client return.

2012 Overall Rating: 4.25 Stars

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