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REVIEW

Nov. 07, 2013

CPA Practice Advisor



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Basic System Functions – 4.5

After purchasing the Intuit Tax Research product, users of Lacerte and ProSeries can directly access the product from the respective tax programs, though it is in a different location in each program. In Lacerte, the research product appears at the bottom under the tab, “Tax Research Powered by BNA.” In ProSeries, it appears on the right side of the screen.

Intuit Tax Research is a web-based product and may be accessed through a web browser on any type of device. However, it is designed for desktop browsers and to integrate with Intuit's tax preparation software. The research site is split into two parts, with a navigation tree to the left and content or search results to the right. Since there are few options to customize the layout, the site is best used with a landscape oriented monitor.

Much like the Google search engine, a search bar across the top uses autocomplete to suggest topics the user may be typing. There are advanced search options to search for an exact phrase, all of the words of a search phrase, at least one of the words of a search phrase, and without specified words. To the right of the search options, there are buttons to browse the table of contents or index, participate in tax discussions, or access support links.

Content – 4 Stars

Intuit's website for the tax research software claims to contain 1.5 million documents, including the Internal Revenue Code, Federal and State court cases, regulations, publications and rulings. The site also offers BNA Analysis and “Fast Answers.” Also provided on the site is a link to the Intuit Tax Research online community, where users can ask questions and discuss issues. Search results for the online community are provided to the right of the documents list.

Since the research materials included with Intuit Tax Research are primarily focused

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other common customization features.

The tax research community site allows a user to receive e-mail notifications when questions are answered or place discussions on a watchlist. Users can also upload a picture and submit a short bio.

Integration / Import / Export – 4.5 Stars

Firms using Lacerte and ProSeries may find the direct integration with the tax research product to be a big time saver. Each program contains a search box, as well as links to browse indexes or table of contents, which launch Intuit Tax Research without the need to enter a username or password. As the user navigates to different fields in the tax programs, the tax research window lists relevant research materials.

In the research site, there is a button to print a document which launches the computer's print dialog. If a computer has a PDF print driver installed, it may print to PDF. While there are no options to export directly to other programs, users may manually copy and paste text to third-party software (such as Microsoft Word).

Next to the print button is an "attach" button with a picture of a paper clip. This "attaches" a document to a client's tax file, which makes it easy to retrieve it later with the attachments button within the tax research window of the tax preparation software. Attached documents may be set to roll forward with the return for up to seven years.

Help/Support – 4.75 Stars

Intuit offers many support options to its customers through phone, online chat and e-mail. Support for the tax research software is managed through the customer's tax program. Although there is not much written material specifically written for the tax research product, there are a series of how-to videos on the support site which claim

to help users learn the product in under seven minutes. Also on the support site, there

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Research may be a good value with multiple individuals using the integrated tax preparation programs.

Best Fit

Firms using Intuit's tax preparation products will benefit from the easy access and built-in search box into both Lacerte and ProSeries.

Strengths

- Search is powered with Google technology.
- Research website launches from tax preparation programs with no need to enter a username or password.
- Research documents can be "attached" to a client's Lacerte or ProSeries file for later reference.
- Simple to learn and begin using; how-to videos help users learn to use the product in under 7 minutes.
- Pricing is all-inclusive and licensed for all Lacerte or ProSeries "seats" a firm has purchased.

Potential Limitations

- Currently, there is no mobile app, and experience may not be optimal on portable devices.
- Content is primarily focused on federal and state income tax issues; limited materials for accounting, auditing and other types of taxes.
- No ability to highlight or annotate documents within the program, though it could be done after printing to PDF (in Adobe Acrobat) or copying and pasting to another program

2013 Overall Rating: 4.25 Stars

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