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Thomson Reuters — Source Document Processing

2011 OVERALL RATING ★★★★★

- ★★★★★ CORE PRODUCT FUNCTIONS/FEATURES
- ★★★★☆ PAPERLESS WORKFLOW
- ★★★★★ INTEGRATION
- ★★★★★ HELP/SUPPORT/TRAINING

800-968-8900

CS.ThomsonReuters.com

2011 Overall Rating 4.5

Best Fit

- Firms who use the related Thomson Reuters applications (FileCabinet CS and

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through entity tax preparation applications.

- Requires firms to use FileCabinet CS, which must be used instead of Adobe Acrobat to annotate and reference source documents.
- Unlike many of its competitors, Thomson Reuters does not sell an Adobe Acrobat extension to assist practitioners with creation of workpapers.
- The application does not support any third-party solutions for document management or tax preparation.

Strengths

- The least expensive scan, organize and populate tool reviewed here, at \$6/return.
- Strong integration throughout the CS Professional Suite applications, including automatic search and import of tax data from the payroll, write-up and flow-through entity tax preparation applications.

Potential Limitations

- Requires firms to use FileCabinet CS, which must be used instead of Adobe Acrobat to annotate and reference source documents.
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Executive Summary & Pricing

At \$6 per return per year, the UltraTax CS Source Document Processing Service is one of the least expensive tools reviewed. Thomson Reuters also offered UltraTax CS users a “free day” during March 2011, where users could try out the service by processing as many returns as they could submit during that day.

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Help/Support/Training – 4

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