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Mary Girsch-Bock • Aug. 18, 2017

intuit. ProSeries

ProSeries Tax

Intuit

Well-suited for small to mid-sized accounting firms that primarily handle 1040 returns, ProSeries Tax from Intuit is available in two versions; Basic and Professional. Seamless integration with QuickBooks in the Professional version makes ProSeries Tax especially desirable for firms currently using QuickBooks products.

From the [2017 Review of Professional Tax Preparation Systems](#).

ProSeries is available as a desktop, server application and does not offer online/remote access, nor mobile apps.

ProSeries offers an intuitive user interface that offers a variety of tools and resources simplify the data entry process including the Where Do I Enter feature, which guides users to the correct area to enter data. A variety of keyboard shortcuts are available for utilization, and the Tax Return Input Guidance feature in the Basic version of ProSeries offers guidance including categories of input, a checklist that helps with selecting the type of input needed, and tabs that guide users to forms that require input or output processing. The Professional version of the product offers Quick Entry Sheets that allow users to input data quicker with less form scrolling needed,

along with the ability to toggle between Quick Entry mode and the standard forms

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track the status of each return, and receive electronic notifications when an e-filed return is accepted.

The Financial Institution Download feature allows users to import financial data such as forms 1099-B, 1099-INT, and 1099-DIV directly into ProSeries, eliminating the need to collect that information from the client prior to processing the return. Users can also create and email an encrypted PDF file of the client's return directly to the client, with client provided with an automatically generated password that will allow them to access the return. A partnership with DocuSign allows firms to request and accept e-signatures on Form 8879, and the availability of the Tax Scan and Import utility allows users to download both W-2 and 1099 transactions from over 24 participating financial institutions. A review tool is available for users in order to check any documents prior to importing into the program.

ProSeries Tax Professional offers seamless integration with QuickBooks products, and the program also offers users a wide variety of add-on options including Pay-by-Refund, where clients can pay their tax preparation fees directly out of their refund, e-Signature, mentioned earlier, Financial Institution Downloads, which offers quick download of client financial data, Intuit Link, which allows users to request tax information from their clients through a secure online portal. Users simply create a list of needed documents and send the list to their client via Link. Clients can then return any requested information securely, with the system tracking any outstanding items that have not been sent. The Client Organizer reduces data entry by obtaining information more efficiently. The product also integrates with both SmartVault and DMS for excellent document management capabilities. And using the optional ProSeries Fixed Asset Manager provides users with the ability to import fixed asset and depreciation data directly into ProSeries.

ProSeries Tax offers solid help functionality, offering users a variety of help and support options including a live community of users to ask questions and share

solutions with, the Ask ProSeries option, a news feature, both field and form specific

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and supports both individual and business tax forms and includes support for over 3,500 forms and schedules. A Pay-Per-Return License is available for \$270 per year, and 1040 Complete runs \$1,929 per year and includes unlimited 1040 for all states.

2017 Rating – 4.5 Stars

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