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Lacerte.intuit.com

800-934-1040 (ProSeries)

Proseries.intuit.com

The Lacerte DMS and ProSeries DMS are essentially the same application with minor differences to accommodate their respective tax prep packages.

Core Functionality

As you might expect, the primary feature is the integration with the tax software. When you print a preparer or client copy of the return, a check box is provided to send a copy directly to the appropriate client folder in the DMS.

Navigation of the documents begins with a client list organized by type, i.e., individual, business, etc. A template of folders and sub-folders keeps the documents organized. The template is established globally and applied to all clients. You can customize the folder structure for individual clients as necessary. There are three tabs in the document view: documents/folders, client information to display contact info, and an issues tab to access a log of recorded issues related to the client. The client information is synchronized with the tax program. A PDF print driver lets you publish output from any application directly to a select folder as a PDF. 4.75

Integration

In addition to the tight integration with the tax prep software, a "Save to DMS" button is added to the MS Office applications to store files directly to the DMS. E-mail integration lets you select a whole document or individual pages, as well as password protect the file with 128-bit encryption. You also have the option to

include or exclude annotations. You can store multiple client e-mail accounts and a

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available. 4.5

Advanced Functionality

Document searching is enhanced by the ability to assign one or more customized category labels to a document. Every year, the user is given the option to automatically add a new folder to the folder template for the current year. More than a dozen individual user permission settings can be established to secure the documents. In addition, passwords assigned to tax return files in the tax software are applied to document accessibility in DMS. An archiving feature is not currently available, but is scheduled for release this summer.

A particularly unique feature offered by Intuit is the Document e-Sort service. For \$3 per client, you can upload an unorganized file of a client's supporting 1040 tax documents and you will receive a fully bookmarked and sorted PDF file. 4

Summary & Pricing

These programs are well designed and offer a lot of functionality for the price at which they are offered. The pricing for Lacerte is \$830 for the first year and \$170 annual maintenance fee thereafter. The ProSeries version is priced at \$450 annually.

2010 Overall Rating 4.5

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