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Mary Girsch-Bock • Jun. 18, 2020



## ProSeries Tax

Intuit

<https://proconnect.intuit.com/proseries/>

**From the [2020 reviews of professional tax preparation systems](#).**

ProSeries Tax from Intuit is best suited for small to mid-sized accounting firms that need to prepare both personal and business forms for clients. ProSeries Tax currently

offers two plans: Basic, for firms that only prepare 1040 forms, and Professional, for

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can now lock prepared returns in order to eliminate unauthorized changes, with the application able to detect changes in calculations. When a change is detected, the e-filing process will be automatically stopped in order to ensure changes are accurate, with users able to then e-file the locked returns.

The eSignature feature has also been updated, with real time notifications available so users can see when clients sign documents. The eSignature feature also includes a status dashboard to check the status of any document that needs a signature.

In addition, ProSeries has made it easier to create client letters, adding 18 new standard letters including an updated engagement letter, an amendment letter, and a Spanish client letter.

## **Product Features**

ProSeries Tax provides users with a series of tools and resources to simplify the form preparation process, including line sensitive help options, the ability to access support from any entry screen or form, and the 'Where Do I Enter' feature, which provides guidance to users that are not quite sure where to enter information on a return.

Users can use the K-1 import option to easily transfer data to individual returns, and the Professional plan includes quick entry sheets that allow users to toggle between form entry mode and quick entry mode while scrolling less. ProSeries Tax also includes various keyboard shortcuts that streamline the data entry process even more.

ProSeries Tax includes a variety of client management tools including a client advisor, that offers more than 70 tax planning suggestions; the client presentation tool that allows users to create visually attractive charts and graphs for clients; and the tax planner feature, that allows firms to create a variety of scenarios for clients

for future tax years. ProSeries Tax supports multi-year e-filing, and users can keep

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easily accessible from the ProSeries Tax homepage. The application also includes Intuit Link, which is a secure online portal that can be used for easy document sharing. The portal can be customized to reflect firm branding, and includes a number of features including automated client reminders and email templates that can be customized for each client. Users can easily track the status of any document requested through Link, with an automatic reminder sent to clients that have not provided the requested documents by the due date.

ProSeries Tax integrates with QuickBooks Desktop applications, allowing users to easily import documents directly into the application. ProSeries Tax also integrates with ProSeries Organizer, which allows users to easily carry over prior year client information, and SmartVault for easy online document storage and the Document Management System. Other integrations available in the Professional edition of ProSeries Tax include the Tax Scan and Import feature that allows users to automatically import data into client 1040 returns from financial institutions, and the Fixed Asset Manager, ideal for firms that need to manage client assets. The eSignature option from DocuSign allows firms to request and obtain electronic signatures from clients, and the Network Sharing option allows multiple staff to access client files from a single stored location. Both editions also integrate with the Pay-by-Refund feature and the Quick Collect feature,

ProSeries Tax offers good support options, with users able to access help and support anywhere in the application. In addition, the new Learn & Support page in ProSeries Tax offers numerous help topics, installation and setup assistance, and the option to pose a question. The Basic plan also includes guided workflow for first-time product users. Telephone, email, and chat support options are available, with support included in the price of the application.

Well-suited for very small to mid-sized firms that process both individual and business returns for their clients, ProSeries Tax offers two product options: ProSeries

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### **Product Strengths:**

- Low price point is attractive to very small to mid-sized firms
- Offers on-premise and cloud access

### **Potential Limitations:**

- Business returns only available in more expensive plan

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