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new features with the new release for tax year 2023.

Dec. 12, 2023



Accountants using [QuickBooks Online](#) know they are getting a solid cloud-based solution to keep their clients' books. However, when they combine QuickBooks with

Intuit [ProConnect Tax](#), they'll get a more powerful way to manage their clients'

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“With ProConnect Tax, everything is in one place; I’m able to accomplish what I previously needed 4-5 other software subscriptions to do,” said Al-Nesha Jones, CPA, MBA, founder of the [ASE Group](#). “When I’m using an integrated tool, I’m reducing the chance for error and reducing data entry, and it’s reducing the time ... it all just plays into more efficiency, less data entry, and fewer errors. It means that you can serve your clients in a manner that matters.”

The Books to Tax feature is not new to ProConnect Tax, but there are a number of new features with the new release for tax year 2023:

**IRS transcripts direct access.** Pull client’s data straight from the IRS into ProConnect Tax, with the [IRS transcripts feature](#) to complete fast, accurate returns with less client back and forth. Watch this [YouTube video](#) for more information.

**Customized client letters.** Create and send templated letters to clients, with preset

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**Custom print settings.** Customize digital templates of your client's tax return documents for easy client review, while standardizing and automating your workflow. Select documents and forms to include, rearrange the order, mask SSNs, add a watermark, and more.

**Batch extension eFile.** Batch extend up to 10 multi-modular (individual and business) federal, state, and local extensions. Preview a dashboard to help ensure returns pass all required diagnostics and payment requirements before e-filing.

**Hot keys (shortcuts).** Accelerate productivity with a compiled list of convenient, accurate, and fast shortcut key combinations while using main navigation, client tax returns list, and return navigation.

**Intuit Link client reminders.** Send clients reminders to join [Intuit Link](#) and complete their organizer every seven days until the client marks the task as done.

**Expanded tax filing capabilities.** Access 20 new e-file capabilities and 73 new e-file forms.

There are also three features coming soon to ProConnect Tax:

**Prep for Taxes (New! Tax adjustments).** Reconcile tax adjustments to QuickBooks imported trial balance in ProConnect Tax, and update or reclassify tax mapping prior to importing books data to the tax return. QuickBooks sold separately.

**1040 direct data import.** Create a new client using pertinent data extracted directly from their prior year 1040 form and generate a tax summary comparison for the current tax year.

**K-1 package delivery.** Create and distribute individual K-1 packages to partners via email using a secured link.

“ProConnect Tax is very easy and intuitive to just see how things are flowing, and to

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with the new [Intuit Assist for QuickBooks](#) by offering powerful and relevant insights based on business performance and behavior.

“If you're not adopting the technology we have, your competition is using it,” said Maslehati. “Clients are going to ask, ‘Hey, why aren't we using AI here? How are you doing it?’ And if we don't have good answers for that, that's where we lose a little bit of credibility.”

To find out more about how ProConnect Tax can help you save time and speed your workflow, call 844-890-2729 or [click here](#).

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