



# 10 PROFESSIONAL TAX SOFTWARE MUST-HAVES

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It's easy to stay dependent on your current tax software—but don't lose sight of the fact that the world keeps changing and, if your tax software doesn't keep you ahead of the game, your firm could fall behind. There's no better time than this moment to step back and ask yourself, "Is this program truly helping me accomplish my goals for my business—or is there room for improvement with better software?"

Over the years I've had the opportunity to work directly with many of our new **UltraTax CS®** customers to find out what features benefited them the most after they switched. Here are 10 of their favorites:

- 1 **True multiple monitor support**, which provides synchronized views of current year input, prior year input, forms and/or diagnostics simultaneously, across up to four different monitors.
- 2 **Automatic sharing of K-1 and demographic data** between returns based on tax ID numbers—no manual linking required! This strength resulted in UltraTax CS tying for the top spot in the *Journal of Accountancy's* tax software survey in the category "How well did it handle transfers of data within returns?"<sup>1</sup>
- 3 **Dynamic diagnostics** that make sure you never miss a thing, like pointing out all the fields where you entered data in last year's return but don't yet have entries this year.
- 4 **Fixed assets management** that both automates your data entry across all states *and* comes preprogrammed with the correct depreciation method and life for hundreds of different asset types.
- 5 **A zero maintenance tax system** that applies its own updates, without ever requiring you to kick staff out of the system—particularly when you need to apply mission-critical updates mid-day.
- 6 **Multi-state processing utilities**, like a single screen for all apportionment data entry for all states in business returns and a multi-state allocation grid for individuals. Our customers like these features so much they rated UltraTax CS as one of the #1 tax softwares in the *Journal of Accountancy's* tax software survey category for multi-state business return processing.<sup>2</sup>

<sup>1,2</sup> <http://www.journalofaccountancy.com/issues/2016/aug/2016-tax-software-survey.html> (See the Overall Ratings table)

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- 7 **Maximum return, form and e-file support**—including composite return filings for virtually all states where available, tangible personal property tax (PPT) returns for 15 states, and many other state and local filings. UltraTax CS users responding to the *Journal of Accountancy*'s survey cited form comprehensiveness as their second most-liked attribute of UltraTax CS.<sup>3</sup>
- 8 **An intuitive, Google-powered help system** that places all help resources at your fingertips—including in-program help, guides, release notes and more—all available from a single search box.
- 9 **An integrated and easy-to-use eSignature capability** that drastically simplifies signing Form 8879 e-file authorizations for clients and minimizes the e-file management burden on your firm.
- 10 **Accuracy and timeliness** are the “table stakes” of any tax system, so we were glad when UltraTax CS users responding to the *Journal of Accountancy* survey cited accuracy as their most-liked attribute of the product.<sup>4</sup> Furthermore, we're proud to be able to say that for the spring 2016 filing season, over 99.6% of our 249 federal and state e-file systems were online and available as of each jurisdiction's opening date for e-file.

As someone who prepares a number of returns each year for friends and family on top of my work schedule, it really saved my sanity when I added eSignature to the mix. For those of you already using UltraTax CS, I hope you'll consider doing likewise by setting up UltraTax CS for eSignature use this coming season.

It's really not possible to share everything UltraTax CS can do to revolutionize your tax process in just ten bullet points, so if you're not already using UltraTax CS, visit [Tax.TR.com/CS-Professional-Suite/Tax-Workflow](http://Tax.TR.com/CS-Professional-Suite/Tax-Workflow) to watch a free demo and see how UltraTax CS can help your firm thrive.

### Want more information about UltraTax CS and eSignature?

- Visit [Tax.TR.com/UltraTaxCS](http://Tax.TR.com/UltraTaxCS)
- Call **800.968.8900**
- Email [CS.Sales@TR.com](mailto:CS.Sales@TR.com)

<sup>3,4</sup><http://www.journalofaccountancy.com/issues/2016/aug/2016-tax-software-survey.html> (See Table 2)