

# ProSeries TY07 Product Fact Sheet

**Corporate Name:** Intuit Inc.  
**Tax Product:** ProSeries  
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## PRODUCT SPECIFICS

	<b>ProSeries Professional</b>	<b>ProSeries Basic</b>
Designed to meet the unique needs of these Businesses:	Small to medium-sized tax professionals who may also provide other accounting services	Beginning and entry-level tax professionals looking to grow their practice
Product Overview & Highlights:	<p>Reliable and efficient professional tax software that helps you prepare returns right, the first time:</p> <ul style="list-style-type: none"> <li>Forms-based data entry and tight integration between Federal and State forms helps move you through a return quickly</li> <li>In-depth calculations, 1,000+ diagnostics and extensive in-product tax guidance helps you prepare returns confidently</li> <li>Vigorously tested software, advanced e-filing and knowledgeable support result in a tax solution you can count on</li> <li>Committed to developing innovative ways to solve your biggest problems</li> </ul>	<p>Affordable and easy-to-use professional 1040 tax software perfect for growing practices:</p> <ul style="list-style-type: none"> <li>Reliable performance, integrated e-filing capabilities, dependable calculations and deep diagnostics help you to prepare accurate individual 1040 and State returns</li> <li>Guided workflows, client checklists and simple data entry make it easy for you to complete a return</li> <li>Tax guidance and Final Review tools to help keep you compliant with current tax law</li> <li>Tools to work and look like a professional</li> </ul>
<b>Pricing</b>		
1040	\$1,099 – early season \$1,299 – late season	\$349 - 50 returns (1040/2 States) \$390 – Unlimited returns (1040/2 States) \$565 – Unlimited returns (1040/4 States) + 100 e-file returns (1040/State)
1040 Renewal	Same pricing as above with early season renewal discounts & incentives	Same pricing as above with renewal discounts
State Package	All individual States included with 1040	Choice of States included with Basic package
State Renewal	Same as above	Same as above
Additional fee for laser package?	No	No
Pay-per-Return	\$17 for 1040 \$13 for Individual States  PPR-only customers charged a one-time annual license fee of \$250.	\$17 for 1040 \$9 for Individual States  PPR-only option not available
Add-on cost for electronic filing software	N/A	N/A
Cost for electronic filing software	Unlimited individual e-filing free with early season renewals. \$150 – unlimited indiv. EF \$150 – unlimited biz EF  \$3 – pay-per-return Federal \$2 – pay-per return State	100 e-filing transmissions included with top Basic package. For others:  \$3 – pay-per-return Federal \$2 – pay-per return State
Conversion package available	Yes	Yes
Conversion package available	Yes	Yes
Cost of conversion package	Free	Free

**PRODUCT SPECIFICS (cont.)**

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<b>Electronic Filing</b>		
Provide Direct (DF) filing?	No	No
Provide service bureau (SB) filing?	No	No
Provide e-file for what forms?	Federal 1040 returns and extensions; all e-fileable Individual States and the MN M1 PR Property Tax Return Federal 1040 Estimated Payments (as part of an e-filed Federal 1040 return)  Federal 1120/1120S/1065 returns and extensions; selected States  Federal 990 returns and extensions  Amended Federal 1120/1120s/1065/990	Federal 1040 returns and extensions; and all e-fileable Individual States and the MN M1 PR Property Tax Return.  Federal 1040 Estimated Payments (as part of an e-filed Federal 1040 return)
Can you electronically file state returns?	Yes	Yes
Do you allow for electronic signature?	Yes	Yes
<b>Market</b>		
Number of individual users of the 06 Tax Year package	One account per firm; not based on individual	One account per firm; not based on individual
Number of firms using the product?	50,000+	14,000+
Percentage of renewals form the 05 Tax Year?	~95%	~85%
<b>Support</b>		
Do you have a toll-free phone number for support	Tech Support: 800-434-6818 Customer Service: 800-374-7317	Tech Support: 800-434-6818 Customer Service: 800-374-7317
Days/hours (Eastern Time) of support available during tax season	M-F: 8 am - 10 pm Sat: 11 am - 6 pm Sun: 12 am - 5 pm  Sat Ext Hours (1/19, 1/26, 2/2, 2/9, 2/16, 4/12): 10 am - 7 pm  4/7 - 4/11, 4/14: 7 am - 2 am 4/15: 7 am - 3 am	M-F: 8 am - 10 pm Sat: 11 am - 6 pm Sun: 12 am - 5 pm  Sat Ext Hours (1/19, 1/26, 2/2, 2/9, 2/16, 4/12): 10 am - 7 pm  4/7 - 4/11, 4/14: 7 am - 2 am 4/15: 7 am - 3 am
Number of support staff during peak periods	79	79
<b>Technology</b>		
What operating system(s) does the product run on?	Standalone: Windows XP (Service Pack 2, Home, Media, or Professional Edition), Windows Vista (Home Basic, Home Premium, Business, Ultimate, Windows 2000 (Service Pack 4 or greater)  Network: Windows Vista (Business, Ultimate), Windows XP ( Service Pack 2, Professional Edition), Windows 2003 Server (Service Pack 1), Windows 2000 Server (Service Pack 4), Windows XP (Service Pack 2 Home Edition)	Standalone only: Windows XP (Service Pack 2, Home, Media, or Professional Edition), Windows Vista (Home Basic, Home Premium, Business, Ultimate, Windows 2000 (Service Pack 4 or greater)

**PRODUCT SPECIFICS (cont.)**

	<b>ProSeries Professional</b>	<b>ProSeries Basic</b>
Recommended operating system	Standalone: Windows XP (Service Pack 2, Home, Media, or Professional Edition), Windows Vista (Home Basic, Home Premium, Business, Ultimate)  Network: Windows Vista (Business, Ultimate), Windows XP (Service Pack 2, Professional Edition), Windows 2003 Server (Service Pack 1), or Windows 2000 Server (Service Pack 4)	Windows XP (Service Pack 2, Home, Media, or Professional Edition), Windows Vista (Home Basic, Home Premium, Business, Ultimate)
Recommended hard drive space	Recommended hard drive space: 2GB Minimum: 850 MB	Recommended hard drive space: 2GB Minimum: 850 MB
Minimum RAM recommendation	512 MB RAM	512 MB RAM
<b>Display &amp; Data</b>		
Is IRS data displayed on screen?	Yes	Yes
Is vendor data displayed on screen?	Yes	Yes
Batch processing?	Yes	No
Heads-down data entry?	Yes	Yes
<b>Program Management Tools</b>		
Does the product produce:		
Organizers?	Yes	No
Reports?	Yes	Yes
Labels?	Yes	No
Client letters?	Yes	No
Scheduling program?	Yes – ProSeries Practice Manager	No
Document management?	ProSeries Document Management System (DMS)	No
<b>Other Packages Available</b>		
Online tax preparation option?	No	No
Are state packages available?	Yes	Yes
Is a multi-state package available?	Yes	Yes
<b>Product Includes</b>		
1120/Included in price?	Yes/Not included	No
1120S/Included in price?	Yes/Not included	No
1065/Included in price?	Yes/Not included	No
1041/Included in price?	Yes/Not included	No
990/Included in price?	Yes/Not included	No
706/Included in price?	Yes/Not included	No
709/Included in price?	Yes/Not included	No
5500/Included in price?	No/Not included	No

**PRODUCT SPECIFICS (cont.)**

	<b>ProSeries Professional</b>	<b>ProSeries Basic</b>
<b>Web-based Services or capabilities provided during tax season</b>		
Ability to download initial program?	Yes	Yes
Ability to download updates?	Yes	Yes
Online demos?	Yes	Yes
Frequently Asked Questions?	Yes	Yes
Searchable Knowledgebase/ Infobase?	Yes	Yes
Package tracking?	Yes	Yes
Online preparation/hosted software?	No	No
Online electronic filing?	No	No
Online billing review?	No	No
Discussion groups?	Yes	Yes
Online Organizer?	No	No
Web site construction available?	No	No
Online storage of complete forms?	No	No
<b>Integration</b>		
Product integrates with:	QuickBooks, Quicken, ProSeries Document Management System, Forms Library, ProSeries Fixed Asset Manager, Intuit EasyACCT, Accountant's Trial Balance format, TXF format	Quicken
<b>State Forms/Support</b>		
State Forms	All Individual States and most business States supported	All Individual States
<b>Customer Contact Information</b>		
Customer Contact	1-800-934-1040 www.proseries.com	1-800-934-1040 www.proseries.com
<b>Media Contacts</b>		
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