Intuit Accountants

Intuit Practice Management

Now, there's a better way to work.

Every hour you spend on internal communications is an hour away from developing your business or getting actual tax prep done. Get time back for what matters to you by bringing all of your conversations and work together in one secure, online, collaborative platform with Intuit Practice Management powered by Karbon. It deeply integrates with your work email provider and Intuit Lacerte Tax, and Intuit ProConnect Tax, so you can run your tax firm efficiently from one place.

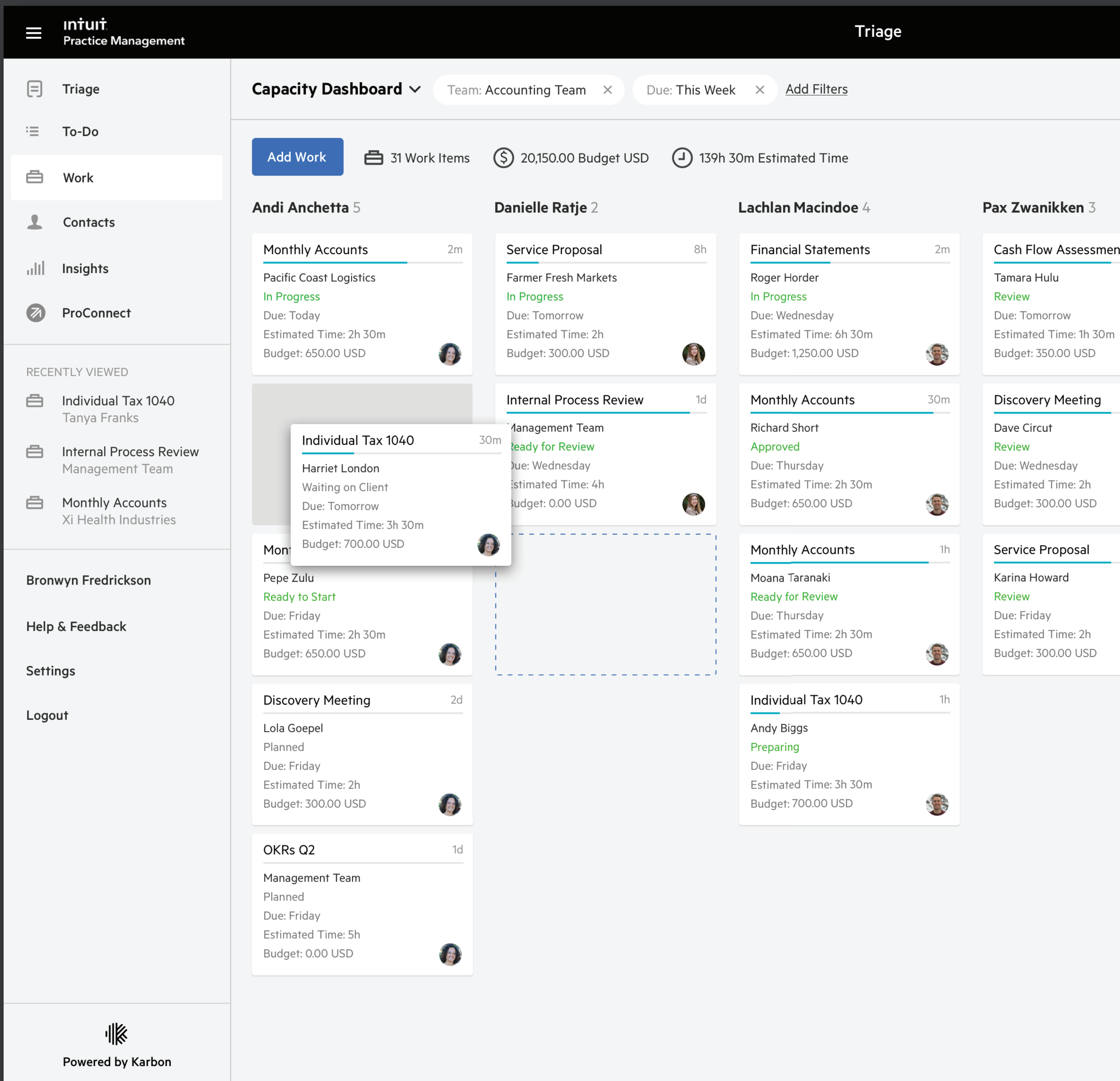
Contact your sales representative to learn more.

Work

Keep up with your work as it progresses and quickly adjust assignments to optimize staff capacity.

Customize your views by:

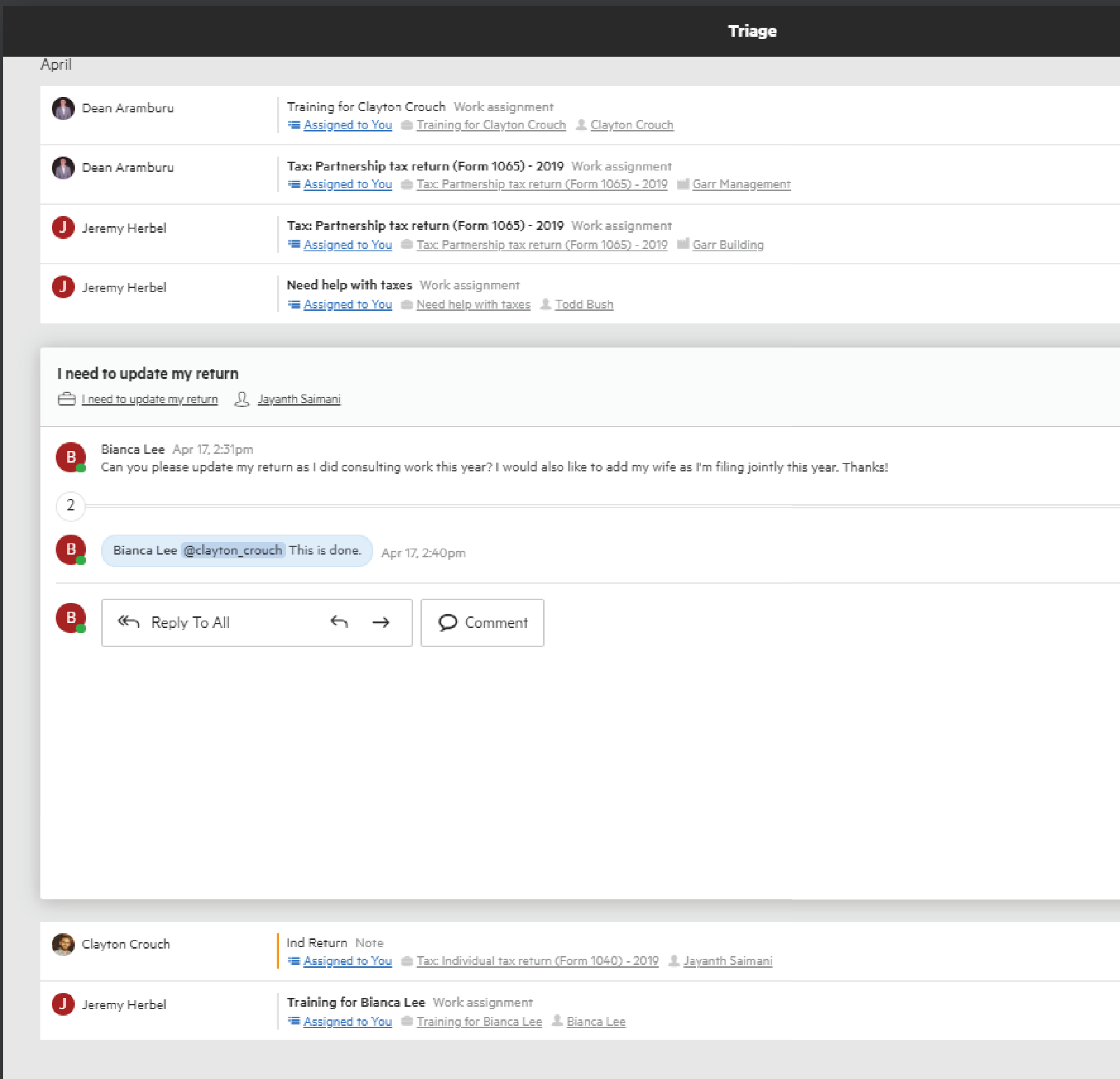
- Clients and services
- Staff member
- Deadlines and statuses



Collaborate

Communicate with staff and clients in real-time without losing sight of the work.

- Integrates with Gmail, Microsoft Exchange and Microsoft Office 365
- Staff conversations with @mentions
- Private, internal discussions tied to the original client email
- Complete audit history of communications with or about a client



Automate

Standardize processes and consistently deliver exceptional client experiences.

- Proven work templates for every service in your profession
- Tax templates exclusively made for Lacerte and ProConnect
- Schedule recurring tasks for staff and clients
- Automatic client reminders and notifications