

Streamline year-end all in one place

Fly through tax prep and filing with Workpapers and Pro Tax together in QuickBooks Online Accountant.

1

Keep an eye on your clients' books all year round



Access all the documents you need in one place

Get a single place to store your clients' financial documents with QuickBooks Online accounts. Plus, easily drag and drop files into Workpapers.



Enhance accuracy and efficiency

Get notified when clients make changes in their books, and benefit from the accuracy of single source data.



Manage books with ease and precision

Give strategic advice in real-time with access to your clients' financials all year.



2

Prepare for year-end with Workpapers



Save time on manual entry every year

Easily create rules, and input and group data. Plus, you can carry your settings over each year, and items will be automatically categorized and pre-populated.



Stay organized with ease

Access templated year-end checklists or personalize your own.



Collaborate easily—without file transfers

For every client account, accountants and bookkeepers can add notes and attachments, and easily pull the files they need.



Stay accurate for year-end

Rest easy knowing any adjustments made in Workpapers will carry through to connected forms and returns in Pro Tax, and in your clients' books.



3

Move data from Workpapers to Pro Tax to get started on returns



Go from books to tax in a flash

Once client working papers are generated, you can move them into Pro Tax with the click of a button.



Start a tax return with confidence

Support virtually every client and scenario with full form sets of T1, T2, and T3 returns. Plus, use the built-in Active Auditor, which flags potential errors, and explains how to correct them.



File faster online

To submit to the CRA, simply click the EFILE button, then print or save a copy as a PDF.



[Learn more about Workpapers and Pro Tax](#)

See what other professionals are saying:



“

I don't have to go into six different programs to do my job, everything for my bookkeeping and personal income tax clients is in one place.

Rachelle Smith, Bookkeeper



“

Having all of our data and workflows in one centralized system is a big timesaver for our firm.

Tristin Deshoux, Founder,
ONYX Accounting

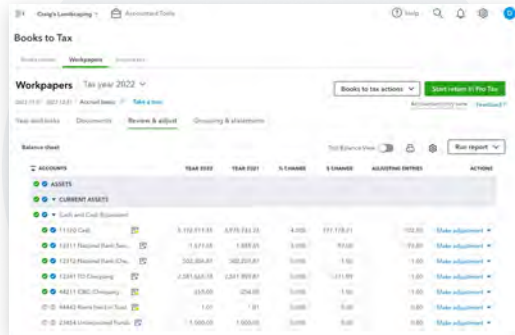


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There's seamless connectivity between the tools, so we can rest easy knowing everything is correct.

Muhammad Azam Razzak, Founder and Managing Partner,
Marsers Consulting

Explore all you can do with Workpapers and Pro Tax together

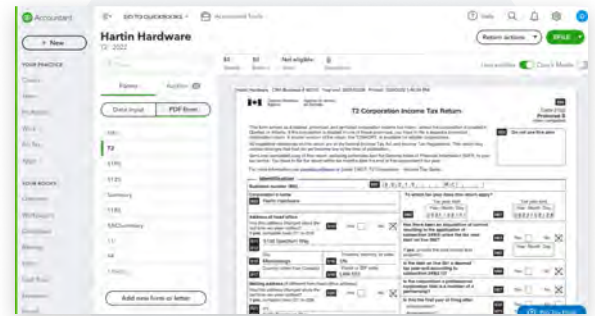


Workpapers

- Free to use in QuickBooks Online Accountant
- Work directly in your clients' books without needing to export
- Store client engagement in a single place with Document Manager
- Adjust entries and compare prior and current tax-year data side by side
- Get and approve change notifications
- Arrange accounts into groups to get a simplified report when you prepare financial statements
- Add notes, attachments, and reference codes to customize your reports
- Reduce the time spent on importing and exporting with GIFI mapping
- Save your progress with automatically synced data

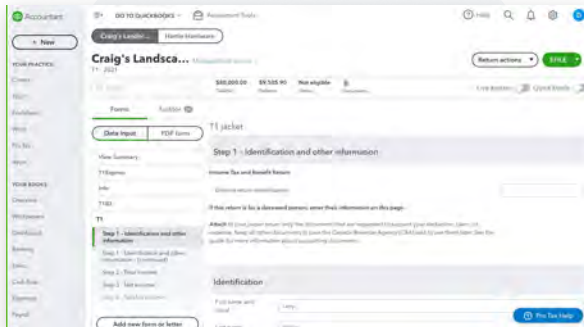
Pro Tax T2

- Unlimited T2 returns and EFILES
- File returns and store documents all in one central place with cloud tax preparation
- Go from books to tax in one place with QuickBooks Online clients
- Create and send invoices to clients
- Catch potential errors with the built-in Active Auditor
- Save time with the T2 Auto-fill my Return workflow
- Convert and carry forward data year-over-year
- Comprehensive forms for English Canada
- Seamless books to tax year-end workflow with Workpapers
- Unlimited cloud storage with bank-level encryption
- Send, receive, and request documents to and from your QuickBooks Online clients
- Quickly create and send client letters



Pro Tax T1

- Unlimited T1 returns and EFILES
- File returns and store documents all in one central place with cloud tax preparation
- T2125 Self-employed tax mapping
- Enter data efficiently with T1 Express Data Entry
- Catch potential errors with the built-in Active Auditor
- Save time with the T1 Auto-fill my Return workflow
- Breeze through compliance with Express Notice of Assessment
- Comprehensive forms for English Canada
- Unlimited cloud storage with bank-level encryption
- Send, receive, and request documents to and from your QuickBooks Online clients
- Optimize pension splits and have the suggested split calculated for you
- Easily create family returns by linking a spouse or dependent
- Create and send client letters quickly



Workpapers and Pro Tax FAQs



Q: Can I use Workpapers and Pro Tax for clients without a QuickBooks Online account?

You can use Pro Tax even if your client is not currently using QuickBooks Online. However, you can only use Workpapers for clients with a QuickBooks Online account.

Q: How does the Pro Tax free trial work?

You can create up to seven T1 returns and seven T2 returns per firm for free with your Pro Tax trial! You will need to subscribe when it's time to EFILE, print, or export your return.



Q: Do I need to update the software every year?

No, your cloud-based Pro Tax software is always up-to-date, so you remain CRA-compliant.



[See more FAQs](#)

Try Pro Tax for free and get a year-end workflow from start to finish

[Try Pro Tax](#)

Questions? Talk to a product expert.



Call **1-800-250-9845**

OR

[Book a demo](#)

Note: You must have a QuickBooks Online Accountant account to access Workpapers and Pro Tax. Don't have an account? [Sign up for free.](#)