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Form Magic, Inc. – Tax-Mate 1099

888-746-0440

www.FormMagic.com

From the Nov. 2012 [Review of W-2 and 1099 Preparation programs](#).

Best Fit: Accounting firms working with large clients that need various import and integration options

Strengths

- Multiple options for importing and entering data
- Multi-client management tools
- Built-in diagnostic tools

Potential Limitations

- No built-in invoicing option

2012 Tax-Mate 1099 Version Enhancements:

- Step by Step Rollover procedure to transfer data from previous year to current year is even simpler than before.
- Enhanced Home Screen for fast and easy selection from multiple payers.
- New dual form correction dialog that displays both the original and corrected data.
- 1099-K's are available in several versions of TaxMate 1099.
- Improved data mapping when importing recipient data from Excel.
- Improved flexibility in selection of which forms are to be included in transmittal to the IRS.

- Enhanced the Backup process, program now creates a single file backup for easier

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updates include improved features for importing data from Excel, backing up data and correcting forms onscreen.

Basic System Functions: 4.5 Stars

Tax-Mate Advisor provides complete management, filing and printing capabilities for accounting firms managing multiple clients. The software supports unlimited payers with multiple recipients and can be used concurrently by firm staff. The home screen layout is simple and user-friendly, making it easy to add and select payers and forms. It also features a five-step Quick Start Guide for new users.

When a user selects a form, the form displays with either a blank data entry screen or the most recently completed recipient form. The screen displays four tabs for payer, recipient, amounts and a form view. Data entered in the first three tabs automatically populates on the form in the fourth tab. Likewise, data entered directly into the form view will automatically populate the corresponding data entry fields on the previous three tabs.

Tax-Mate's printing options allow users to print on plain paper or pre-printed forms. It also supports electronic filing with the IRS and SSA.

Reporting: 4.25 Stars

Tax-Mate 1099 Advisor supports all 1099 and 1098 forms, W-2, W-2C, W-2G, 5498, W-3 and 1096 forms. Tax-Mate also verifies TINS and checks for errors, allowing users to make the necessary corrections. The 2012 version gives users greater flexibility in choosing which forms to submit to the IRS and allows users to preview forms onscreen before printing. Users can also choose which copies to print.

Tax-Mate supports batch printing of forms, allowing staff to choose to print specific forms for individual or multiple clients simultaneously. All forms and data can be

exported to Excel or saved in PDF format. Users can also print coversheets, form

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DT and FIRM formats. It also supports a two-step importing process from QuickBooks. Users need to export data from a Quicken report and then import it into Tax-Mate. Tax-Mate can export files to Excel or PDF formats.

Help/Support: 4.25 Stars

The Tax-Mate Help menu gives users several help and support options. Users can access the website, User Manual, remote support and updates. The remote support option opens another application that allows Rx-Mate Tech Support to remotely connect to the user's computer. The website hosts demos, a learning center and FAQs.

Summary & Pricing

Tax-Mate provides complete management, filing and printing services that include managing multiple clients and filing and printing federal and state forms. There are several batch printing options, giving users flexibility and greater control. The comprehensive Advisor version costs \$295 per year for unlimited in-firm users. Prices for the other versions are: Print, \$45; Print+, \$145 and Transmittal, \$195.

2012 Overall Rating: 4.25 Stars

Financial Reporting • Income Tax

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