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W 27 10 55

Oct. 31, 2013

CPA Practice Advisor



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searching data, as well as tabs for submitting forms to the IRS and state and local governments. The wizard helps users set up new payers, assisting with the data entry for contact and tax information. When working within client files, the program offers a taskbar with additional menu items at the top of the screen, allowing users to quickly access, edit and create forms and import data.

Recipient forms can be accessed from the top of the screen and lists can be sorted using various criteria. Other options include printing functions and help utilities, such as quick tips and the ability to download updates from the vendor's website. Magtax also reviews forms before printing to check for any errors or missing information.

Reporting – 4.25 Stars

Magtax provides support for forms 940, 941, 944, 945, W-2, W-2G, W-2C, W-3, 1042 and 5498 and all versions of forms 1099 and 1098. The program also offers free federal and state electronic filing and printing to both plain paper and pre-printed forms. Users can save reports in various formats, most commonly PDF and CSV.

The software's two-way integration with QuickBooks allows users to manage billing and invoicing – functions that are not built into the software. The company offers forms and paper supplies for users but not envelopes or print and mail services.

Import/Export Capabilities – 5 Stars

Several options are available for importing and exporting data into Magtax, including QuickBooks, Excel, CSV and text files. The software also supports older file formats and offers a remote client data import function. Reports and forms can be printed in PDF format for electronic distribution, but portals are not supported.

Help/Support – 4.5 Stars

Magtax's help and support includes the traditional Help index, a getting started

guide, screenshots and a setup wizard. The support website offers tips, company

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Professional Edition costs \$299 for a five-user license, with upgrades costing \$159. The Standard Edition is \$199 for a single-user license and upgrades cost \$109.

Best Fit: Firms managing year-end wage and information reporting and filing for multiple business clients.

What's New:

- eVerify in Professional Edition
- Separate screens for each form
- Enhanced user interface for Professional Edition
- Enhanced e-filing process
- Extension e-filing in Professional Edition

Strengths:

- Unlimited forms
- QuickBooks integration
- Support for various file formats
- Prior year form printing and e-filing in Professional Edition

Potential Limitations:

- Does not offer after-the-fact payroll
- No built-in invoicing functionality
- Portals not available

2013 Overall Rating: 4.5 Stars

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