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CPA Practice Advisor



The W-2/1099 Filer is a comprehensive year-end compliance and reporting solution.

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access and generating reports and forms.

Data can be entered in numerous ways including traditional data entry fields or interactive forms, which simulate the federal and state forms. Recipients can be used across multiple companies and FICA wages and withholding are automatically calculated. The solution also offers a full-time audit trail. The solution now features a reminder that will alert users when it's time to change SSA and FIRE passwords.

Reporting – 4.75 Stars

The W-2/1099 Filer supports all 1099 and 1098 forms, 1042-S, 5408, W-2, W-2C, W-3, W-3C, 1096, 940, 941 and 943 forms. Users can connect directly to the IRS and SSA websites through the W-2/1099 Filer's e-filing feature to submit forms and check the status of previously submitted forms. Users can also file for extensions electronically now.

Reports can be saved to PDF format and security features can be added for secure electronic distribution. The W-2/1099 Filer features a built-in document management feature that lets users attach scanned images and documents to files. Other reporting options include summaries, tally reports and state and local wage listings. Users have the option to print forms on either pre-printed forms or plain paper. Batch printing and sorting are also available, along with outsourced printing and mail services. Users can also print mail labels and envelopes.

Import/Export Capabilities – 4.5 Stars

The W-2/1099 Filer supports multiple formats including QuickBooks, Excel, CSV and XML. The software can pull directly from QuickBooks and offers two-step integration with other payroll systems through the use of other data import formats. It also supports data rollover from the previous year's data. Data can be exported to Excel or PDF formats and emailed directly from within the software. In addition, Proforma and Edit reports can now be printed directly to Excel.

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for \$40 and support for forms 940, 941 and 943 can be added for \$10.

Best Fit: Accounting practices managing year-end reporting for multiple clients.

What's New:

- New look
- Enhanced help options
- Client dashboard
- Bulk TIN matching
- Encrypted PDFs

Strengths:

- Comprehensive state, federal and local form support
- Batch filing and printing options
- Supports multiple data formats
- Remote and local backup options available

Potential Limitations:

- After-the-fact payroll is offered as a separate solution

2013 Overall Rating: 4.75 Stars

Financial Reporting • Income Tax • Payroll • Small Business

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