CPA
Practice**Advisor**

W2 Mate provides an easy to use year-end compliance reporting system. With the

supports an unlimited number of companies each with an unlimited number of employees or 1099 recipients.

W2 Mate can handle a large volume of records and natively supports a number of batch processing tools including batch print, batch employee/recipient delete and batch update of W-2 and 1099 forms. All prior year W2 Mate data will easily roll forward to the current year release through a simple process. Access to the data files and software itself is only accessible through an encrypted user and password system.

Reporting – 4.25 Stars

The core W2 Mate solution supports W-2, W-3, 1099-MISC and 1096 reporting forms. To achieve full 1099 form support, an additional module is required. An additional module is required for electronically filing W-2s and 1099s with the IRS and Social Security Administration.

All forms will print to preformatted forms, unless users purchase additional modules. Two separate modules are required to print forms to plain paper and generate PDF files. The PDF module provides password security protection on top of generated PDF files. All generated PDF W-2 and 1099 files may be batch emailed to the recipients, but, again, will require a separate module.

integration/Import/Export – 4.75 Stars

Through an available import module, users may import from CSV or Microsoft Excel files. Unique to W-2 Mate, is the vast array of accounting systems supported for direct import. Currently, QuickBooks, Sage 50 (Peachtree), Microsoft Dynamics and Sage DacEasy are supported.

All data contained with W2 Mate exports natively to Microsoft Excel. These files

guides are maintained on the company website. All help and support options are US-based, offered during normal business hours and are fully included in the licensing fees.

Best Firm Fit

Accounting professionals looking for an inexpensive way to process year-end compliance forms

Strengths

- Simple screen layout and data entry design
- Core product is inexpensive and provides the majority of needs
- Wide support for data import, with appropriate module purchase

Potential Limitations

- Multiple module options and add-ons may confuse some users

Summary & System Pricing

W2 Mate is a cost effective solution for processing year-end tax compliance forms. W2 Mate is a modular system, which may be confusing to some users, with each module carrying its own pricing structure. The core product pricing is $39 with each add-on module currently individually priced between $25 and $115. A complete system, including all network capabilities and advanced functions, will cost around $500.

2014 Overall Rating: 4.5 Stars

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