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Mary Girsch-Bock • Oct. 23, 2016

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W2 Mate

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- Modular product allows users to purchase just what they need
- Affordable for any budget
- Supports an unlimited number of employees and recipients

Potential Limitations:

- Need to purchase additional modules for full system functionality

W2 Mate is an easily affordable product from Real Business Solutions that provides accountants and businesses with the ability to prepare, import, file and print both W-2's and 1099 forms. The vendor also offers a long-list of add-on modules to increase product functionality.

From the [2016 review of W-2 and 1099 preparation and filing systems](#).

Basic System Functions – 4.5 Stars

W2 Mate is typically installed on local desktop computers, but an add-on module is available that offers network installation capability. W2 Mate supports an unlimited number of companies and an unlimited number of employees and recipients, with users able to utilize the excellent batch tools included in the product, including the ability to batch print forms, batch delete employees or recipients, as well as batch update both W-2 and 1099 forms.

The main user interface screen is logically designed, with a drop down menu at the top of the screen, and icons that provide quick access to system functions available in a vertical menu bar on the left side of the screen. Easy shortcuts for importing and exporting data are available from the main interface as well. Like similar products, the data entry screens mirror the actual form being processed, with instructions available for all forms. Prior year totals and other information is easily rolled forward to the current year to avoid additional data entry, and users can easily

password protect system access to safeguard confidential data. Bulk TIN Matching is

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purchase of an additional module. The product is designed to work on pre-printed forms, but users can purchase an additional module which offers the capability of printing on blank paper. An additional module is also available for users to create PDF W-2's and 1099's to email to clients or employees, so they can print the forms themselves.

Integration/Import/Export – 4.75 Stars

While each module in Real Business Solutions is sold separately, most accountants or business owners would do well to purchase all of the related modules in order to enjoy the full functionality that the software can provide. Importing and exporting data to Excel is available, and the product can import and export CSV files as well. The product will also integrate with QuickBooks, Sage 50, Sage DacEasy, and Microsoft Dynamics, and users can also create mailing labels in the product as well

Help/Support – 4.5 Stars

W2 Mate offers U.S. based support, with telephone, email, and chat support options available to product users, with support included in the price of the software. The product also offers form guides and instructions, as well as a video review of the product for new users, and a section of FAQ's is also available for users to access if needed.

Summary & System Pricing

W2 Mate is an easily affordable software product designed to efficiently process a high number of W-2's and 1099's. Though sold as a series of modules, users would see far more product functionality if all (or most) of the modules were purchased. Pricing for W2 Mate is \$39.00, with the network add-on available for \$125.00, additional 1099 processing \$25.00, PDF W2 runs \$30.00, 1099 Batch Emailer is

\$135.00 and Laser Forms runs \$25.00, making the entire system available for under

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