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CFS Tax Software, Inc. — W2/1099 Payroll System

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From the October 2005 [Review of W-2/1099 Software](#)

The W2/1099 Payroll System offers support for electronic, magnetic media and paper print wage and information return preparation for most versions of Form(s) 1099, 1098, W-2, and associated forms. Those users who are familiar with the interface common to all CFS programs will quickly feel at home with W2/1099. The program consists of a basic program with the following add-ons: e-file/Magnetic

Media (which enables electronic and floppy disk filing to federal and supported state entities), an After-the-Fact 941/940 Program, and a Payroll Return Corrector (which supports corrections to previously filed forms).

The W-2/1099 program costs \$99 (\$89 renewal), and the 941/940 Program costs \$99 (\$89 renewal). The Payroll Corrector Program (corrects back to 1978) costs \$39 (\$29 renewal), and a Network Upgrade (unlimited users at one business address) is \$100 per year. The Mag Media add-on is \$99.

Usability/Navigation — 4.5 Stars

W2/1099 features an interface divided into three panes: a client list at the top left, an in-use forms list to the right, and a comprehensive list of available forms such as a printable fax cover sheet, invoice utility, memo and a 1099/W-2

client solicitation letter. Navigation is easy, and the program is quickly learned, making it second nature after preparation of a user's first return. I found the simple screen layout to be very satisfying but also noted the lack of a sortable, on-screen client listing. With a large number of clients, a sortable listing becomes a necessity to program operation. The company noted that a sortable listing is available for each client's employees/payees.

Configuration options allow the user to control system behavior in areas such as the recalculation of social security taxes withheld and decimal key defaults in data entry. When creating a new form, W2/1099 prompts the user to import the data or to select the option to manually enter data. This process was clear and to the point. Client data can be entered directly into on-screen form replicas or can be transferred from the CFS Payroll System, which includes a handy paycheck withholding calculator for manual check entry and automatically calculates FICA withholding when entering payroll into the CFS Payroll System. Forms-based data entry uses color-coded fields that show whether information was entered by the system (via calculations or transfer from supporting documents) or entered by the user. It also provides instructions at the bottom of the screen for the active data-entry field. As indicated earlier with pricing for a network upgrade, the W2/1099 Payroll System is available in a networked version.

Reporting & Import/Export Capabilities — 3.5 Stars

The W2/1099 Payroll System has very limited import abilities, allowing only the direct transfer of data from QuickBooks. No support is available for import from common file formats such as spreadsheets, *.CSV files, comma- or tab-delimited files, or other database or columnar files. The company noted that the CFS After-the-Fact

941/940 program supports QuickBooks as well as ASCII importing of employees, employers and paychecks. If the user also owns W-2/1099, they can then copy their recipients into the W-2/1099 program. CFS provides reconciliation and client summary reports, and prepares Form(s) W-2, W-3, 1099-MISC, 1099-SA, 1099-INT,

1099-DIV, 1099-A, 1099-B, 1099-C, 1099-PATR, 1099-R, 1099-S, 1098, 1098-T, 1096, and State Form(s) A1-R/A1-APR (AZ), CT-W3 (CT), G-1003 (GA), IL-W-3 (IL), MW 508 (MD), NJ-W-3M (NJ) and VA-6 (VA).

Support For Paperless Transmission — 4.5 Stars

Using the e-file/Magnetic Media module, users can e-file or populate floppy disks to transfer tax information to appropriate agencies. The e-file/Magnetic

Media module provides support for preparation and printing of Form(s) 4419, 4804, 6857, 8508 and California state forms.

Help/Training — 4.5 Stars

The W2/1099 Payroll System features online integrated Help features and an indexed Windows Help utility. It provides a “Tip of the Day” upon startup (which can be turned off for very experienced users), mouse-over button descriptions, and line-specific instructions for the active line while in the forms-based entry mode. It also includes a tutorial and a wizard for the creation of cover letters, envelopes and invoices. Program support is available via the Web, via traditional telephone support, and through seminars and training. Updates are available online, and W2/1099 can be configured to automatically checks for online updates.

2005 Overall Rating — 4.5 Stars

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