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## *Software*

Tax-Mate 2005 is offered in three versions: Tax-Mate Print, Tax-Mate Transmittal, and Tax-Mate Advisor. Tax-Mate Print, the base level product, is designed for businesses that need to produce and distribute a limited number of 1099 and W-2 forms, and submit the data via printed Form(s) 1096 and W3. Tax-Mate Print supports Form(s) 1099-DIV, 1099-INT, 1099-MISC, 1099-R, and W2.

Tax-Mate Transmittal, the next level product, is designed for businesses, schools or credit unions that require the ability to produce, distribute and submit electronically or via paper means. In addition to the forms supported by Tax-Mate Print, Tax-Mate Transmittal includes support for Form(s) 1098, 1098-E, 1098-T, 5498, 5498-SA, and 5498-ESA. Tax-Mate Advisor, the top-level product, provides businesses, banks and accounting firms with the form and filing support found in Tax-Mate Transmittal with the addition of support for Form(s) 1099-A, 1099-B, 1099-C, 1099-CAP, 1099-G, 1099-H, 1099-LTC, 1099-SA, 1099-OID, 1099-PATR, 1099-Q, and 1099-S.

All versions will handle any number of payers/payees and unlimited electronic or magnetic media filing. The Print version is \$89, the Transmittal is \$189 and the Adviser is \$289 for new customers. Returning customers get up to a 25 percent discount when reordering. A Mac version is also available with the same feature and price as the Windows version.

## **Usability/Navigation — 5 Stars**

Tax-Mate offers a functional interface that provides a list of forms, recipients and clients. Three different views are available: Browse, Find and Preview modes. Data entry is performed by selecting a form from the Forms pull-down menu and

then entering payer and recipient information on the left side of the entry

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Tax-Mate contains other productivity-enhancing features, such as the ability to zoom with one click, client-level password protection, spell checking, easy duplication of records, and custom font sizes and colors. An Error Check function performs a check on the current form or all forms. Results of the Error Check are provided on-screen where the user can select and go directly to the forms on which errors were found.

Tax-Mate is very user friendly, and it scores high on usability once users pick up the program's flow, which results in a very efficient system with a short learning curve.

### **Reporting & Import/Export Capabilities — 4.5 Stars**

While Tax-Mate does not import directly from specific accounting programs, its import/export capabilities get the job done. Tax-Mate accepts files in \*.CSV and many other file formats. The import utility provides a field-matching function that allows users to quickly map imported data files. Tax-Mate provides self-totaling 1096 and W-3 forms and supports all Windows-compatible printers. It prints to plain paper and pre-printed forms.

### **Support For Paperless Transmission — 4.5 Stars**

Tax-Mate Advisor includes a handy transmission wizard that supports magnetic and electronic filing. This wizard makes the actual uploads process easier for first-time and infrequent users, or for those such as myself who have “slept since then!”

### **Help/Training — 4.5 Stars**

Tax-Mate offers an HTML-based Help utility, a tutorial, access to IRS instructions, and free traditional telephone support. All three programs can be downloaded via the company's web site along with program updates.

**2005 Overall Rating — 4.5 Stars**

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