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## ATX — Total Tax Office

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*From the April/May 2006 [Review of Tax Prep Suites](#)*

ATX has rapidly developed a solid user base of its tax preparation programs, offering a variety of bundled packages based on practice specialty, as well as several accounting and engagement applications. The most comprehensive tax preparation package offered by the vendor is Total Tax Office, which includes state, federal and local preparation for all entities in addition to an online and CD-based research and analysis portfolio from its sister company Kleinrock, and several practice tools such as AR, sales tax compliance and client management functions. A four-user license of Total Tax Office for our prototype office ([defined in the intro](#)) costs about \$2,100, which includes all modules and unlimited e-filing of individual, corporate and partnership returns.

### **Learning Curve — 5 Stars**

The ATX tax package is centered around the MAX preparation system, which opens by default to the Return Manager for the current user. This screen offers a spreadsheet client selection list for that preparer, with sortable and filterable client data, including form type, name, company, e-mail, phone and other information.

This screen also provides a query tool for finding specific client returns, and tabs for AR and the Tax Warehouse enable users to quickly view summary client

data without having to actually open a return. The exceptionally designed and intuitive interface also includes an array of tabs at the top of the screen for performing proforma rollover, managing firm preparer data, tracking e-filing acknowledgements and other information, and bank product data. The program also offers crisp and easy-to-understand icons.

The system provides both a forms-based entry mode and an interview method, allowing users to select the most comfortable technique. The interview method is actually more of a guided form-based mode, however, with the screen splitting into two sections: The top offers a line-by-line explanation of what the data requirement is, while the bottom shows the actual form where data is entered. This method of entry is ideal for novice or irregular preparers since it provides good assistance while also letting them gain familiarity with the actual forms. Additionally, a virtual assistant is available that provides additional guidance. When creating new client returns, the user simply selects the entity type, then the form to be started. For primary forms (1040, 1120, 1065, etc.), the system automatically attaches required supporting forms and schedules to the return.

When within a client return, all forms and schedules are accessible via tabs across the top of the work area. Additional tabs across the bottom of the screen allow users to easily move between the pages of a form, jump to specific sections (such as dependent data, income and deductions), or view summary information, a checklist, preparer data and other options. The system maintains a running tax due/refund due total at the top right of the screen. As with most tax preparation programs, Total Tax Office can only open one return at a time, but users can check summary data on other returns by using the Easy View function without having to close out of a return in progress. Overall, the system's interface and general use is very intuitive, allowing users to be comfortable with the system during first use.

#### **Use/Workflow & Productivity Tools — 4 Stars**

As mentioned previously, the program is centered around the Return Manager and client list, offering an almost one-stop location for summary information on clients. The exception is that this list does not offer return status, which can be viewed from the Tax Warehouse tab. One of Total Tax Office's most notable features is the inclusion of Kleinrock's research offerings, which includes the tax vendor's Federal TaxExpert, All States TaxExpert, Employment TaxExpert, the Quick Answers Library, Federal Tax Bulletin, Total Tax Guide,

and additional materials. These research materials can be accessed online or via CD, and research can be linked to client returns.

In general, the program guides users through the return preparation process, with right-click access to line-specific instructions and assistance, thereby aiding in workflow for less experienced users while enabling more savvy preparers to quickly move between forms and other preparation tasks. The system includes the ability to attach notes or mark areas of the return for review purposes, and also provides drill-down capability from form lines to associated forms and schedules, but does not include a formalized review process. ATX also includes online client organizers that reduce data-entry time, a sales tax compliance application, an AR component with an aging report, a depreciation schedule for basic asset management and a quick calculator function. Client documents and returns can be generated into \*.PDF format, aiding in the paperless process and in electronic client communication and collaboration.

#### **Integration/Import & Export — 4.5 Stars**

As a suite of tax products, ATX transfers data between components as necessary including, new (finally) for TY2005, two-way K-1 data sharing and enhanced transfer

between associated parent/child returns. Although the system does not directly integrate with third-party accounting systems, ATX can pull in data from Excel documents, which means that it can access data from most such programs through a two-step import-then-export process. The vendor provides free conversion from most major tax preparation programs. As noted above, the system integrates with Kleinrock's tax research products, allowing linking of research materials to specific return lines.

#### **Support/Training & Help System — 4.5 Stars**

Total Tax Office provides good built-in Help with right-click access to line-by-line instructions, content-sensitive Help and the optional virtual assistant, in addition to tutorials, documentation and links to web-based training. The company does not offer in-person training options. ATX also offers an online user community called ATXers, where users can assist each other with "real life" return issues and treatment. The vendor's phone-based support, which is included in the program, has been the subject of recent postings on some user boards because of the company's purported use of external support representatives. The company noted that more than 90 percent of support calls are handled by

ATX staff in Maine, with only overflow of technical issues going to an external source during peak demand times.

### **Product Evolution & Vendor Vision — 4 Stars**

ATX has focused much of its recent development efforts toward online utilities and integration with Kleinrock's research libraries, in addition to its obvious continued efforts toward maintaining an exceptional user interface. The company was a little delayed in incorporating K-1 integration capability, but the program now is capable of handling this much needed function, and ATX seems to be focusing development on enabling the program to handle more complex returns. As I said in last year's review of this product, although neither the tax nor the research components are the strongest on the market, the integration of these functions at such a moderate price and with such a friendly user interface is remarkable.

### **Relative Value — 4.5 Stars**

ATX provides the easiest and most intuitive user interface of the comprehensive professional tax programs reviewed. With form and interview data-entry options and abundant assistance features, in addition to online Help resources and good research integration, and all at a very attractive price point, ATX Total Tax Office provides an excellent mid-market tax preparation option. Although the recent K-1 and other data flow improvements increase the capabilities of the system, it is still ideally suited primarily for smaller and midsize firms with less complex client bases.

### **2006 Overall Rating — 4.5 Stars**

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