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Form Magic, Inc. — Tax-Mate

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Tax-Mate

is offered in four versions: Tax-Mate Print, Tax-Mate Laser, Tax-Mate Transmittal and Tax-Mate Advisor. Tax-Mate Transmittal and Tax-Mate Advisor support paperless transmittals to the IRS and SSA. Tax-Mate Print and Tax-Mate Laser support paper transmittals and produce the required Form 1096 and W-3 transmittals for smaller filers. Tax-Mate Print costs \$89, Tax-Mate Laser costs \$119, Tax-Mate Transmittal costs \$189, and Tax-Mate Advisor costs \$289. Substantial discounts are available for returning customers. The vendor also offers a Mac version.

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 W-2, while Tax-Mate Laser supports all Form(s) 1099, 1098, 5498 and W-2. Tax-Mate Transmittal is designed for businesses, schools or credit unions that require the ability to produce, distribute and file electronically or in paper form. In addition to those 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 plus 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.

New for 2006 is a Transmittal wizard, a quick find bar in the form database, the ability to select records via a checkbox, and a new print interface with icons and descriptions of forms. It also offers the ability to print current record, all records, selected records, and printing of records for a single payer. As well, the newest version added Form(s) W-8 and W-9. All versions include unlimited payers/payees, and both the Transmittal and Advisor include electronic filing. This is a workhorse!

Pam Dickson of Plymouth, Minnesota-based Carver, Moquist & O'Connor, LLC, said they selected Tax-Mate after searching the Internet and realizing it had everything they were looking for in addition to the right price. "We had trouble finding an affordable software that also prepared 1099-Rs," she said. "Generating W-2s and 1099s for clients isn't considered a profit center, so ease of use and cost are huge factors." Dickson's firm has approximately 60 employees and offers the "whole plethora of compliance work as well as QuickBooks consulting, IT consulting, and audit and reviews."

Dickson appreciates the fact that recipients and companies only have to be entered once and can then be used across multiple recipients/companies. "Working with small businesses, there are always related companies for which this comes in handy," she noted. Dickson does wish that the program were a little more intuitive to learn: "It takes a little thought to run the program, but once someone is given instruction it makes sense." She'd also like to see multi-user capabilities.

Usability/Navigation — 5 Stars

Tax-Mate features a functional user interface that provides a list of forms, recipients and clients. Users can select from three different views: Browse, Find and Preview. Data entry is fast. Users select a form from the Forms pull-down menu, followed by entering payer and recipient information on the entry sheet. Entry fields for payer and recipient use an AutoFill function that delivers pull-down lists of available users for those groups. After selection of an existing payer or payee, the system automatically populates the address, contact and

EIN/TIN fields on the applicable form. On-screen data entry is performed on column-like tax forms.

While in data-entry mode, users can access form-specific IRS directions that open in a separate window. Tax-Mate provides *.PDF versions of more than 20 IRS forms, which are very handy in teaching, answering questions and as a system reference. Tax-Mate contains other productivity-enhancing features, including 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 checks on the current form or all forms. Results of the Error Check are provided on-screen and are user-selectable to go directly to the applicable form on which errors were found. Tax-Mate is extremely user friendly — an efficient system with a very short learning curve.

Reporting & Import/Export Capabilities — 4.5 Stars

Tax-Mate does not import directly from any specific accounting programs. However, it does accept files in *.CSV and many other file formats. The import utility works via a field-matching function that permits users to quickly map an imported data file. Tax-Mate provides self-totaling 1096 and W-3 forms and supports all Windows-compatible printers. Tax-Mate prints on plain paper and pre-printed forms.

Support for Paperless Transmission — 4.5 Stars

Tax-Mate Advisor and Transmittal include a handy transmission wizard that supports electronic filing. This wizard makes the actual uploading process easier for first-time and infrequent users, or for those who have “slept since then.”

Help/Training — 4.5 Stars

Tax-Mate offers an updated manual, HTML-based Help utility, *.PDF Help documentation, a tutorial, access to IRS instructions, and free traditional telephone support. All four programs and their updates are available for download at the company’s website.

2006 Overall Rating: 4.5 Stars

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