preparation software for forms 1040, 1041, 1065, 1120, 1120S, 990, 706, 709, 5500, municipal forms, sales and use tax, and also the premier research offering from Kleinrock, which provides electronic versions of federal and state research libraries and tax law analysis that integrate with the tax preparation software, as well as Kleinrock's Employment TaxExpert, 1040 Quick Answers, Federal Tax Bulletin, Total Tax Guide, and additional materials including more than 10,300 forms and CPE options for professionals. The system costs $2,100 for a four-user license and includes unlimited e-filing of 1040s and 1120 returns.

Learning Curve ' 5 Stars

MAX is ATX's core tax preparation system and serves as the centerpiece of Total Tax Office Plus. The remarkably well-designed user interface opens to a client list for the user logged in. This client list defaults to a spreadsheet view that provides basic client data, including name, contact info, preparer, status and other info. Additional tabs on the client list enable quickly viewing Accounts Receivable and Tax Warehouse functions, which allows the user to view summary tax info such as AGI, bracket and total deductions, as well as billing information, without having to pull up the return. The AR function includes an aging report and can also be used to sort clients on-screen by account aging period. Interestingly, data in these spreadsheet lists, which is supposed to be a summary of the client and return data, can be easily edited directly on the client list, but this data does not flow to the return. Client returns can also be located using the query tool, which allows multiple methods of sorting, limiting and searching the return list.

For data entry onto returns, Total Tax Office Plus allows users to select either form-based entry or an interview mode, with line-by-line instructions available in the forms-mode by right-clicking, and provided on-screen automatically in the interview mode. The system offers easy access to the various primary components of the program through tabs at the very top of the screen that allow the user to keep an in-progress return open while accessing other sections, such as the Return Manager,

The Total Tax Office Plus package, using MAX as its interface, provides a structure that is centralized around the Return Manager client list. As noted above, this list provides multiple options for finding and accessing client returns. Also, the ability to easily move to associated source documents from form entries assists in the workflow and review process. The program's additional 'Manager' sections provide additional focus points for overseeing bank products, prior-year data rollover, and the e-file process, and the Easy View option provides an additional method of viewing summary return and AR information for a client without opening their return, which means this information can be accessed while still working on another return.The program makes good use of right-click menus on forms, including the ability to link fields to cells, attach notes, access instructions, open a basic calculator or cross reference data entries.

As pointed out in our recent meeting with ATX, one of the most valuable components of Total Tax Office Plus is the inclusion of Kleinrock's comprehensive research package, which includes electronic and web-based research tools that can be linked to from within the MAX preparation program, as well as print-based reference materials. MAX includes an online client organizer that can directly feed client-provided information into the system. The web-based organizers can be accessed by staff from the My ATX online community, which also includes functions for accessing e-file status reports and other information. MAX also has the ability to convert documents, including all client tax forms, into *.PDF format, allowing preparers to provide their clients with electronic copies of their documents and minimizing paper costs. MAX includes a depreciation schedule that handles basic fixed asset management but does not include the ability to perform mass dispositions.

‘Total Tax and MAX are easy to use and have an intuitive design, and the form-based

integration with bank product providers and integration with CRM software.

Integration, Import & Export ‘ 3 Stars

ATX’s MAX does not distribute K-1 data to associated returns, nor does it transfer data between associated parent/child returns. The program can acquire client financial data from Excel-formatted documents, which results in a two-step import process of exporting and then importing from most accounting packages including Peachtree and QuickBooks, and the company offers free conversion for users transferring from ProSystem fx, ProSeries, TaxWise, Drake, Orrtax and Lacerte. The system’s Rollover Manager simplifies bringing forward data from a client’s previous year return that was prepared in MAX, allowing users to select clients from a list similar to the primary client list found in the Return Manager. The system integrates with the electronic versions of Kleinrock’s tax research products, including the Total Tax Guide, but does not provide true direct integration with other financial applications.

Support/Training & Help System ‘ 4.5 Stars

ATX’s primary help utilities include the ATXers online community for users to assist each other, and the software boasts an abundance of built-in support utilities, including web-based training, video tutorials, access to line-by-line instructions from within the form, context-specific help and the company’s online support center, which offers FAQs and other support options. The Total Tax Office Plus software bundle includes ATX’s Super Support plan, which provides toll-free support Monday through Saturday
during tax season.

Product Evolution & Vendor Vision ‘ 4 Stars

ATX has quickly become a major player in the professional tax preparation market

ongoing development.

Relative Value ' 4 Stars

As the cornerstone of Total Tax Office Plus, the MAX preparation system offers an extremely easy-to-use interface that simplifies data entry while providing expedient access to supporting documents by linking entry fields to those documents. Optional form- or interview-based entry modes further allow users to move at a pace that is appropriate to their skill level. The inclusion of Kleinrock's research libraries in Total Tax Office Plus adds considerable value to an already attractively priced system, giving users access to volumes of primary federal and state source materials as well as opinion and analysis, with the ability to search these resources from within a client's tax return. This bundle includes unlimited e-filing, which allows firms to know their total tax season cost up-front, regardless of volume. Unfortunately, the program offers only base integration between modules, with no support for transfer of K-1 data to associated returns or parent/dependent returns. As such, the program is best suited to professionals with less complex clients.

2005 Overall Rating: 4

Each of the programs was assessed in the following areas: Learning Curve addresses the ease with which new users are likely to grow comfortable and proficient with the program. This encompasses expected prerequisite knowledge and whether average users will likely need advanced training or support in order to use the program productively. Use/Workflow & Productivity Tools addresses how well a user can move around in the program and perform necessary tasks as a result of the interface, and the way work is handled from the start of a tax engagement (interview) to finish (delivery of return and possible planning for next year). This section notes tools that help professionals keep track of client and tax authority status for returns, as well as additional functions such as integrated calculators and cross-form linking that

FAQs, online user communities or other more advanced systems.

The Product Evolution & Vendor Vision segment looks at the vendor's apparent commitment to continued development of its product by looking at the technological culture of the company and its product development history. No professional wants to invest in a preparation package that stagnates or whose vendor goes out of business. Finally, Relative Value offers the reviewer's subjective assessment of the dollar-value ratio of the software. The most expensive option does not necessarily guarantee the best value, nor is the product with the lowest sticker price always the greater bargain.

The Overall Score will provide an average of the review components, rounded to the nearest half-star. Following the review section, the Executive Summary provides a synopsis of the review and is accompanied by a summary chart with all products and grades. To add more value and insight to our reviews, we invited the various tax preparation vendors to visit our office for a hands-on demonstration of their respective products. Each vendor had an opportunity to demonstrate the functionality of their product and highlight the various aspects they believe sets their product apart from those of their competitors within the specific review sections outlined above.