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CPA Practice Advisor



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Quick Start Guide for new users. The solution's IRS compliance indicator features a green button that lets users know when the minimum IRS fields have been filled in.

Tax-Mate's printing options allow users to print on plain paper or pre-printed forms. It also supports electronic filing with the IRS and SSA.

Reporting – 4.5 Stars

Tax-Mate 1099 supports all 1099 and 1098 forms, W-2, W-2C, W-2G, 5498, W-3 and 1096 forms. Tax-Mate also verifies TINS and checks for errors. Users can choose which forms to submit to the IRS and print, as well as preview forms before printing.

Users can batch print forms and export forms and data to Excel or PDF formats. Other printing features and options include coversheets, form instructions, reports, labels, and duplex and multi-copy sheet printing to either pre-printed forms or plain paper. Form Magic also offers both printing and transmittal services for an additional fee, based on quantity. Tax-Mate does not offer a built-in invoicing option.

Import/Export Capabilities – 4.5 Stars

Tax-Mate 1099 supports files in Excel, HTML, CSV, Lotus, Merge, Basic, SYLK, DBF, DIF and FRM formats. It also supports a two-step importing process from QuickBooks. Users need to export data from a Quicken report and then import it into Tax-Mate. Tax-Mate can export files to Excel or PDF formats. Users can also import IRS transmittal file for MISC and W2 forms.

Help/Support – 4.5 Stars

Users can access the website, User Manual, remote support and updates through the solution. The Remote Support feature allows the company's tech support staff to log into the user's computer for one-on-one training and assistance. The website hosts

demos, a learning center and FAQs. System updates and live support are both

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Best Fit: Accounting firms working with large clients that need various import and integration options

What's New:

- IRS compliance indicator added to various forms
- Print button added to each form for ease of use
- Forms updated
- W3 and W3C added to the W2 form

Strengths:

- Multiple options for importing and entering data
- Multi-client management tools
- Built-in diagnostic tools

Potential Limitations:

- No built-in invoicing option

2013 Overall Rating: 4.5 Stars

Income Tax • Payroll • Small Business

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