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Magtax is a year-end form compliance solution provided by American Riviera Software. Magtax is offered in two editions: Standard and Professional. Both offer similar functions, but this review will focus on the Professional edition.

Basic System Functions – 4.75 Stars

Magtax Professional comes with a five user license and provides for an unlimited number of client files. Unique to Magtax Professional, is the ability to host the product through a third-party cloud vendor. Data entry is done through an on-screen replica of the preprinted forms.

A feature added to the 2013 release was the Form Clipboard which allowed users to copy 1099-MISC forms from one company file to another. The current release further enhances this by covering several additional form types.

Social Security Numbers may be verified directly with the Social Security Administration. A number of client management features are also included including

the status of a client file that has been started but not yet completed and if the

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forms. Forms and reports may also be saved as PDF files or a variety of image file types. All print options are provided without a separate, required add-on module.

Integration/Import/Export – 4.25 Stars

Magtax Professional can import data from Microsoft Excel and a variety of text files. QuickBooks data may be directly imported for all W-2 and 1099 vendors. Magtax Professional also supports multiple state reporting exports from QuickBooks.

Help/Support – 4.5 Stars

Magtax Professional is predominantly supported through email communications. This provides users with faster response times as well as more information to resolve questions. Phone support is offered, but generally requires an appointment.

In program help is provided through a traditional drop down help menu. Also provided are a quick start guide and a list of new features for each of the releases. The company website houses a FAQ page and an up-to-date knowledgebase for users to view as well. The company website also has a number of videos to assist users with common tasks such as installing and activating the product and how to import data from QuickBooks.

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Best Firm Fit

Accounting firms processing year-end compliance for a large number of clients

Strengths

- All inclusive design prevents the need to purchase multiple modules for full

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Summary & System Pricing

Magtax Professional is a wage and year-end information reporting system for accounting professionals. Magtax Professional is an all-inclusive offering so there are no additional fees for electronic filing or printing to plain paper. Pricing for Magtax is dependent upon the edition with the Standard edition currently priced at \$199 and the Professional edition currently priced at \$299. Renewal pricing is offered for both editions and is at a discounted rate.

2014 Overall Rating: 4.5 Stars

Financial Reporting • Income Tax • Payroll • Taxes

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