CPA
Practice Advisor

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client ...

Mary Girsch-Bock • Oct. 17, 2019

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suited for small businesses as well as accounting firms. The standard version of Payroll Mate supports up to 10 companies, with a maximum of 75 employees per client, though an add-on module is available that will increase the number of companies supported to 100, and the number of employees per client to 1,000. In addition, Payroll Mate can be deployed in a virtual desktop environment, allowing users to access the application from any location. Payroll Mate does not offer a mobile app at this time, and there is no employee/client self-serve capability in the application, so employees or clients cannot access payroll stubs or other payroll information from Payroll Mate.

Payroll Mate supports multiple pay frequencies including weekly, biweekly, semimonthly, and monthly payroll, and supports multiple pay types including salary, hourly, overtime, double time, bonus pay and commissions. Both vacation and sick leave can be tracked in the application, with the ability to override default amounts if desired. The product also supports after-the-fact payroll, allowing users to enter year to date totals, and Payroll Mate allows users to apply changes to a specific pay period after payroll has been completed for that period. Another nice feature is the ability to create a PDF of checks for clients, and email the PDF to the client, where they can print the payroll checks onsite and distribute them to their employees.

Payroll Mate calculates both federal and state payroll taxes, with tax tables available for all 50 states, and the District of Columbia, though the product only supports automated state reporting for five states: NY, IL, CA, TX, & Fl. Both quarterly and annual payroll reports are supported in Payroll Mate, including Form 941, 940, 943, 944, W-2 and W-3, though electronic filing is not supported in Payroll Mate.

Payroll Mate offers a good selection of payroll reports including an Employee List, Payroll Details, Tax Liability, Employee Earnings, Employee List, and Payroll Totals. Report customization is limited in Payroll Mate, but users can export any system

report to Microsoft Excel for further customization. Reports can also be exported as a

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accounting applications if necessary. Users can import data from a variety of applications including Sage 50, ADP, PeopleSoft, Paychex, and QuickBooks.

Payroll Mate does not offer any client or employee portals, though users can opt to email a paystub to an employee if desired, but there are no dedicated features available to do so. HR capability is not included in Payroll Mate, but there are options to track additional employee information using the Employees Notes option, where basic HR data such as performance review dates, hire and termination dates, or job titles can be tracked.

Payroll Mate includes a variety of wizards to aid users with setup as well as payroll processing. Help can be accessed directly from Payroll Mate, with a Quick Start Guide and a Getting Started video avaiable. Product support is included in the cost of the application, with toll-free phone support available during regular business hours. Chat and email support are also available in Payroll Mate.

Payroll Mate is a good fit for small businesses as well as accounting firms that process payroll for a limited number of clients, though an add-on module is available for accounting firms with more than 10 payroll clients. Payroll Mate is currently available for $119.00 per year, with add-on modules available for Direct Deposit, MICR Check Printing, Payroll Reporting, 1099s, and W-2s. Payroll Mate is a single user application, with 3,5, and 10 user options also available as an add-on. Those interested in Payroll Mate can download a free demo from the Payroll Mate website to try out prior to purchasing.

2019 Overall Rating – 4 Stars

Payroll

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