calculate, print, and file sales tax returns for clients in California and/or New York. CFS Tax Software has been described as the first application that ...

Mary Girsch-Bock • Nov. 23, 2020

CA Sales Tax Preparer

NY Sales Tax Preparer

CFS Tax Software Inc.

www.taxtools.com

From the **2020 reviews of sales tax** compliance systems.

CFS Tax Software Inc. offers sales tax software for accounting firms that need to calculate, print, and file sales tax returns for clients in California and/or New York. CFS Tax Software has been described as the first application that offers electronic filing of California sales tax returns, including the ability to pay taxes electronically. In addition to the sales tax preparer applications, CFS offers payroll, W2/1099 form processing, and TaxTools for robust tax management.

CFS contains an outdated user interface that is fairly similar in both the California Sales Tax Preparer and the New York Sales Tax Preparer applications, and electronic filing is only available in the California application. Even though it's outdated, the interface offers easy system navigation, with users able to click on one of the tabs at the top of the screen to add, edit, or delete a client, view or print a client list, and access a client folder from the main screen. A module library is displayed at the bottom of the screen, offering a list of forms accessible in the application.

One of the more useful features in the CA and NY Sales Tax Preparer applications is

Unlike California, New York State requires that all sales and use tax forms are submitted via the New York State Department of Taxation and Finance website, so the application does not include an option to print and mail completed forms.

CFS offers a good selection of help and support resources including instructional videos, an FAQ page, and complete product installation instructions. CFS also offers telephone support during regular business hours, or users can request support directly from the website. Both chat and remote support options are available as well.

For accounting firms with numerous clients in either California or New York, CFS's CA and NY Sales Tax Preparer is an affordable option. Although the interface is outdated, the application itself remains up-to-date with tax information updated quarterly. Those interested in the application can download a demo directly from the CFS website, with the application easily downloaded onto a desktop, laptop, or workstation computer. CFS CA Tax Preparer for a first-time user is priced at $119, with the annual renewal running $99, and a network upgrade costs $50. The NY Sales Tax Preparer is currently priced at $84.50 for a first-time user, with the annual renewal running $74.50, with a network upgrade also available for $50.

2020 Overall Rating: 4 Stars

Strengths:

- Good support options
- Affordably priced
- Creation of a complete packet for clients

Potential Weaknesses:

- Only available for California and New York

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