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& Use Tax Programs

BNA
Software, well-known for its tax planning, fixed asset management and corporate financial applications, also offers two products geared toward sales and use tax processes. The BNA Sales & Use Tax Rates system is the tax table engine, providing lookup and, optionally via the Rates Exporter, export of rate information for all jurisdictions in the United States. The BNA Sales & Use Tax Forms system handles compliance processes, offering more than 3,400 forms for all U.S. taxing jurisdictions, as well as exemption certificates, business registrations, powers of attorney, and other related forms and worksheets. Both systems are available as either a traditional, CD-based program or as online applications. The single-user editions of the programs cost \$925 each and renew at \$710 per year.

NAVIGATION & DATA ENTRY:

Each of the programs operates separately and each also offers a different user interface, whether locally installed or using the online versions (we chose to use the online versions of both programs for this review). The Rates system with Rates Explorer opens through a web browser into a modern and intuitive interface that offers four program tabs: Search, Favorites, What's New, and Rates Exporter. BNA Sales & Use Tax Rates is primarily geared toward use as a manual rate lookup system, with the screen defaulting to the Search tab, which offers a search field with the ability to look for taxing jurisdictions by ZIP Code, city, county or state, or by all four criteria. The program also keeps a linked list of recent searches, allowing users to quickly access frequent searches. As noted, the Favorites tab also offers the ability to permanently link key searches.

The Rates system does not offer direct integration with any accounting systems

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offer taxability rules (such as, “Are services taxed in jurisdiction X?” or “Is there a back-to-school sales tax holiday in state Y?”).

The BNA Sales & Use Tax Forms system, on the other hand, does not use a web browser (even when using the online version), and instead uses an interface that looks and works like an installed program. The interface offers icons for creating multiple business profiles, working with returns, searching forms and accessing instructions. When starting a new return, users select the states and municipalities and then select from a list of forms and reports available for that jurisdiction. Form replicas automatically calculate, and users can automatically populate business information. Finished reports are saved locally, not online.

FILING, ELECTRONIC COMPLIANCE & PAYMENT:

Compliance and reporting functions are housed in the BNA Sales & Use Tax Forms system, which offers forms, reports and other documents for all states, cities and special districts with sales tax. The program provides signature-ready fileable forms that can also be saved into PDF format, but it does not offer any form of built-in electronic filing or remittance options.

RATE UPDATES:

The online version of the BNA Sales & Use Tax Rates program accesses rate tables that are maintained and updated on BNA's servers so that rates are always up-to-date. For the installed version of the program, monthly updates are available from the company's website or on disc.

HELP/TRAINING:

Each of these systems provides various Help features, such as access to filing information, form instructions, user manuals and tutorials. BNA's website

offers product-specific tips, FAQs and software updates, along with links to

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