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Bloomberg BNA — BNA Sales & Use Tax Rates and Forms

800-424-2938, option 3

www.BNASoftware.com

From the [July 2013 Review of Sales and Use Tax](#) systems.

Best Firm Fit: Firms who need a comprehensive source for nationwide sales tax rates and an exhaustive forms library.

Strengths

- Rate tables include all US jurisdictions, and include functions to validate input and calculate most totals.
- Rate tables can be configured to automatically e-mail updates to users periodically.
- Forms library includes over 3,400 sales and use tax forms, exemption certificates, business registrations, and other documents. Instructions for forms are also included or linked.
- User interface is logical, and will be familiar to current and former users of BNA's income tax forms applications.

Potential Limitations

- Sales tax rates are stored up based on five digit zip codes. Zip code boundaries frequently do not match the borders of the related tax jurisdictions, which may result in errors.
- Rates service and return preparation are two separate services without integration, which results in rekeying of data.
- No options for electronic filing or payment of taxes.

Overview

Bloomberg BNA, the new name for the publisher of the BNA Software applications,

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service ten years ago. Instead of distributing forms to users on CD's, as was the practice a decade ago, the application is now run as a web-based service from any Windows PC.

Users can create profiles with common data for organizations to be used when filling out forms, form data can be saved for future use, and completed forms can be published to PDF or sent to a printer for signature and filing. Most forms have some data validation, and formulas are automatically calculated based on the data input into the screens. The forms are constantly updated, and are available online from anywhere.

BNA Sales and Use Tax Rates is a web-based application which provides current sales tax rates for jurisdictions based on their city, county, or zip codes. Data can be reviewed on the screen for an entire state or individual jurisdictions on the screen or it can be downloaded from the BNA website in a Microsoft Excel format for upload into point of sale or ERP software. BNA tracks the five digit zip codes associated with each jurisdiction, and allows users to look up the sales tax rates by city, county, or zip code.

This may represent a problem for some users, as the zip code boundaries do not always match the boundaries of tax jurisdictions like cities and counties. As a result, the same zip code may appear in more than one jurisdiction, and the wrong tax may be charged.

Summary & Pricing

BNA Sales & Use Tax Rates and Forms make up a basic toolkit for low volume compliance in a wide range of tax jurisdictions. While the services are not integrated with each other, and do not support any electronic filing or remittance, they do give users access to forms and rates anywhere in the country.

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