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product, TaxTools, which offers tax planning, along with retirement and financial utilities.

CFS easily handles multiple companies, with users able to add new clients at any time. A client list is available for reviewing, and users can easily edit or delete current clients as well. Both the CA Sales Tax Preparer and the NY Sales Tax Preparer product allow users to import the prior years' tax client list, eliminating the need to enter data multiple times.

One of the most useful features in CFS is its ability to produce a complete packet of documents for each client, with each packet containing a cover letter, client invoice, and a copy of all returns prepared and filed. Users have the option to allow clients to manually file returns, or they can file them electronically. All forms are saved in the client file for future access and can also be saved as a PDF or printed and mailed as desired.

CFS releases tax updates quarterly, with users able to download the latest tax information directly from the CFS website. CFS offers after-the-fact sales tax calculations and is not designed to integrate with other accounting of point of sale products.

The California Tax Preparer product offers users the option to file California returns electronically or download and print returns for mailing. The New York Tax Preparer product is released in April of each year. The product automatically calculates taxes and vendor credits and can generate a complete set of the forms necessary for direct submission via the website to the New York State Department of Taxation and Revenue.

The California and the New York product have a similar interface with the main difference being the ability to electronically file California forms. California forms can also be printed and filed by mail.

California forms supported in CFS include:

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DS, 401-E, 468, 531-G, 735, 501-ER Electronic Waste Fee, 501-TF Tire Fee, 501-TK Storage Tank Fee

New York State requires direct submission of all sales and use tax forms directly to the New York State Department of Taxation and Finance, so users will need to file forms via the Department of Taxation and Finance website. CFS supports a number of forms that users can create and subsequently file via the website including:

- Form ST-100 Quarterly Sales and Use Tax Return
- Form ST-810 Quarterly Sales and Use Tax Return for Part-Quarterly Filers
- Form ST-809 Monthly Sales & Use Tax Return for Part-Quarterly Filers
- Form ST-101 Annual Sales and Use Tax Return
- Form FT-943 Quarterly Inventory Report by Retail Service Stations and Fixed Base Operators
- Form FT-945/1045 Report of Sales Tax Prepayment on Motor Fuel/Diesel Motor Fuel
- Schedule A Taxes on Selected Sales and Services in Nassau and Niagara Counties
- Schedule FR Sales and Use Tax on Motor Fuel and Diesel Motor Fuel
- Schedule H Report on Clothing and Footwear Sales Eligible for Exemption
- Schedule N/N-ATT Selected Sales and Services in New York City Only
- Schedule P Sales Tax Prompt Tax Payments
- Schedule W Report of Sales to a Qualified Empire Zone Enterprise (QEZE)
- Form OS-114 Connecticut Sales and Use Tax Return
- Forms AU-11, DTF-17, DTF-4/4.1, DTF-80, DTF-95, DTF-96, DTF-280, ST120, ST120.1, ST-330, Pub. 910

Along with sales tax preparation, CFS also offers a variety of other products including the CA 571 Preparer, which prepares California Business Property Tax Statements, MD Personal Property, which prepares Maryland personal property

returns, and the Tax Corresponder, which offers a series of tax correspondence

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Use Tax, CFS is an affordable solution. Those interested can purchase and download the product directly from the CFS website, and a demo is available for download prior to purchase to try the system out. One of the most notable features is its ability to directly file California sales and use tax returns electronically.

CA Sales Tax Preparer is currently priced at \$99.00 for first-time users, and \$79.00 for the annual renewal. The NY Sales Tax Preparer runs \$84.50 for a first-time user, with an annual renewal cost of \$74.50. Users can also purchase a network upgrade for either product for an additional \$50.00.

**2018 Overall Rating: 4.25 Stars**

Sales Tax

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