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CFS Tax Software, Inc. — Sales Tax Preparer (CA & NY)

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Jul. 29, 2005

From the August 2005 review of [Sales & Use Tax Software](#)

CFS Tax Software offers separate editions for California and New York. The Sales Tax Preparer will calculate state, city and local taxes and prints fully approved state forms on blank paper. The California program calculates and prints Form 401 with Schedules A, B, C, G and T, Form 401-EZ, prepayment Form 1150, plus 13 other forms and applications. The program creates invoices, cover letters, fax cover sheets, gross sales summary reports, attachment sheets, mailing labels and envelopes. The California program costs \$99 (\$89 to renew), and an annual network upgrade is \$50.

The NY program calculates and prints Forms ST-100, ST-102-MN, ST-810, ST-809, ST-101, ST-102-MN with Schedules A, FR, H, N, P, Q, CT and NJ, plus nine other forms and applications as well as the “extras” — the reports and routines listed above for California. The NY program costs \$169 (\$149 to renew), and an annual network upgrade is \$50.

Navigation & Data Entry – 4.5 Stars

The CFS modules are easy to navigate and straightforward. One plus for CFS Tax Tools users is that the same interface is employed here. Tax Tools users will immediately feel at home with the CFS sales tax programs. Not to worry as everyone else will get the “hang of things” quickly. A client database may be imported from other CFS programs.

Paper Filing, Electronic Compliance & Payment – 3 Stars

Output is strictly in paper format. However, I noted that California e-filing services are provided by three BOE Authorized Websites, while New York does not yet support e-filing or electronic payments.

Rate Updates – 5 Stars

Updates are available for download via the CFS web site. Some updates are also available by CD. Updates via the web may be automated by the click of a box during program (configuration) setup, which enables the program to automatically check for updates at program startup.

Help/Training – 4.5 Stars

The CA & NY programs feature built-in line-by-line help, program tutorials, desktop and/or e-mail support from within the programs, toll-free live support and FAQs.

Relative Value – 4 Stars

The CFS programs represent a very good value, an opinion that was validated by several users with whom I spoke. One user stated, “We use the California Sales Tax program and would highly recommend it to others.” Another user said that it’s “super easy to move about; we love all the CFS programs.” And when asked about their experience with the product’s help features, one user said, “Help for what? Sorry, we have never used any help functions.”

2005 Overall Rating — 4 Stars

Article

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