

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Jul. 27, 2006

*From  
the August 2006 Review of Sales & Use Tax Systems*

CA Sales Tax Preparer and NY Sales Tax Preparer are separate programs offered by CFS Tax Software for the calculation of state, city and local taxes for their respective jurisdictions, and are both approved by the state taxing authorities. Both programs, as well as most programs developed by the vendor, share the same interface and general navigation functions. This review offers information on both systems. The CA sales tax system has an annual cost of \$99, with renewals available for \$89. The NY version is \$169; \$149 for renewals. Network licenses are an additional \$50 per year. CFS also offers a variety of compliance, planning, payroll and research tools, in addition to forms and supplies, although the Sales Tax Preparer systems can both print to plain paper.

**Navigation & Data Entry — 4.5 Stars**

Sales Tax Preparer opens to a very functional master screen that includes a searchable client list, a forms menu, and an automatically organized list of completed past forms of the active company. It also offers icons and menu options for accessing the system's additional features, which include a simple monthly calendar function that allows the entry of notes for specific clients. The calendar automatically appears when the program is started if a note has been entered for an approaching date. Likewise, a To Do List is available for assigning tasks and recording progress.

The program uses facsimiles of actual forms for data entry, automatically transferring data from supporting worksheets and schedules as necessary, and performing all calculations but allowing overrides. Manually entered, transferred, calculated and overridden entries are highlighted different colors for quick

determination of data sources, with drill-down capability to supporting documents.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

sends an update disc.” Mr. Vernaci also noted that the system has built-in safeguards to make sure that accounts balance before closing.

### **Filing, Electronic Compliance & Payment — 3.5 Stars**

Sales Tax Preparer is geared toward paper filing of sales tax returns and remittances, although California businesses can use the system in conjunction with the BOE’s electronic remittance system. Either state version of the program prints approved state forms on blank paper. The CA system supports and prints form 401 with Schedules A, B, C, G and T, form 401-EZ and prepayment form 1150, along with additional supporting documents. The NY system offers forms ST-100, 101, 102-MN, 810 and 809, with schedules A, FR, H, N, P, Q, CT and NJ, along with additional supporting forms. Both programs offer invoice templates, label/envelope makers, and various client correspondence sheets, including fax cover sheets, memos, statements of account and tax form cover sheets.

### **Rate Updates — 4.5 Stars**

CFS offers downloadable rate updates from its website, as well as optional update CD service for an additional charge. The system can be automatically set to check for and alert users to available program and rate updates.

### **Help/Training — 4.5 Stars**

Sales Tax Preparer includes a good traditional built-in Help utility with line-by-line instructions and filing guidelines, and the company offers downloadable demo versions and tutorials for learning the basics of the system, although the program is very easy to use and should require little training. Telephone, online and e-mail-based support is included in the annual subscription price of the program.

### **Relative Value — 4 Stars**

The Sales Tax Preparer offers an intuitive interface with a client/company list as a central component of the default screen, and keeps all company forms well-

organized

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

**2006 Overall Rating: 4 Stars**

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved