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*From the August 2008 [Review of Sales & Use Tax Systems](#)*

BNA Sales & Use Tax Rates and Forms provides one of the most comprehensive after-the-fact sales and use tax systems. It provides rate lookup, reporting forms and export capabilities without direct integration with point-of-sale or accounting systems. The system includes sales tax rate and historic rate information for more than 58,000 taxing jurisdictions and has more than 3,400 state, city and other entity forms. Pricing for a single-user license of the program ranges from \$895 for a rates-only or forms-only version, to \$1,895 for the full system. The program is available in both installed and web-based formats.

### **Navigation & Data Entry — 5 Stars**

The primary components of the installed version of BNA Sales & Use Tax Rates and Forms are two distinct programs that operate independently of each other, with one offering rate lookup functions and the other providing forms for compliance.

The rate lookup part of the program is essentially a quick tool that provides a jurisdictional rates finder, with a small window giving users the ability to search by ZIP Code, city, county or state, and providing all current rates with dates of enactment, along with prior rates. The display breaks down each of the jurisdictional taxes applied to a particular location, including state, city, county or special districts such as school, utility or transit areas. Additionally, a calculator is included that also breaks the resulting tax liabilities into amounts for these jurisdictions. Users can save searches into a favorites file. As an after-the-fact sales and use tax compliance system, the program does not offer direct live integration with other programs but does offer a rate table export function called the Rates File Generator, which can output

tables into a comma-delimited text file for import into most accounting and

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A forms selection list provides a comprehensive array of state and municipal jurisdictions. If users first select a client business with which to work and then select a form, basic company information is automatically transferred into the form. If the tax report is selected first, users can have this data transferred in by using the Apply Profile function. The primary work area of the interface provides a replica of the actual sales tax report form, with data entered directly onto its fields and calculations immediately applied. Users can override calculations or transferred data if necessary. Users of the web-based system will find similar functionality, but with the added benefit of anytime, anywhere access.

### **Filing, Electronic Compliance & Payment — 2.5 Stars**

BNA Sales & Use Tax Rates and Forms is intended as a print-based compliance system and does not offer integrated electronic filing of tax reports or electronic remission of collected taxes. All forms are signature-ready, approved by appropriate government entities and can be printed to plain paper. Forms can also be output into PDF format.

### **Rate Updates — 5 Stars**

For users of the traditional installed version of the program, BNA Software offers monthly disc-based updates that are mailed to the user, with interim updates that can be viewed weekly from the vendor's website. The company also offers a fully web-based version of the program, for which all updates are automatically maintained by the vendor.

### **Help/Training — 4 Stars**

The program does not offer the traditional Windows-based Help system, but does include an electronic users' manual, various tutorials and other options. BNA Software provides FAQs, a Knowledge Center and Training options on its

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library of forms from nearly 2,000 cities, states and other jurisdictions. ::::;

**2008 Overall Rating: 4 Stars**

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