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*From
the August 2007 Review of Sales & Use Tax Systems*

The BNA Sales & Use Tax Rates and Forms program by BNA Software provides a comprehensive SUT system that covers more than 58,000 taxing jurisdictions in the United States and offers integration with external programs. The program offers basic rates and forms reference, compliance functions, and a rate file generator. BNA Sales & Use Tax Rates and Forms is offered in two formats: as a CD-based system with monthly disc updates and as a web-based program with automated updates. The system is available in various modules, with single-user pricing for a rates-only or forms-only version costing \$895; the rates and forms version costing \$1,595; and the full package including the rates file generator costing \$1,895. Network licenses are also available.

Navigation & Data Entry — 4.5 Stars

The full BNA Sales & Use Tax Rates and Forms program actually operates as two separate programs, one providing forms and the other offering a rate lookup utility. The Forms system, which is the primary application for use in compliance processes, opens to a primary screen that provides an icon bar for accessing core features, including accessing blank forms, creating company profiles and accessing form instructions. Once a business' profile has been created, all demographic company data is automatically transferred to forms being created for the business entity.

To begin the process of preparing a sales tax report, the user simply selects the state or subsidiary jurisdiction from a list that includes current forms. The system then provides a searchable/filterable list of all forms available for that jurisdiction. Selection of a form brings up a full-window view of a

replica of the form, with data entry taking place directly on the form and

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or in a separate data column. The Forms Compliance system is intended as an after-the-fact preparation program and does not integrate with accounting programs.

However, the optional Rates File Generator add-on can create an ASCII text document

of sales and use tax rates for any jurisdiction. This document can then be imported by most accounting applications.

The Rates lookup system opens into a small window that allows the user to search sales and use tax rates for all U.S. jurisdictions by ZIP Code, city, county or state. The system then displays the Detailed Rate Information window, which shows all current sales and use tax rates for a location, including effective date and previous rate information. For locations with transit, school, or utility taxes or other special tax issues, these rates are also presented in the rate data table. A calculator is accessible from this screen, allowing the user to simply enter a sales price and be provided with an itemized list of the various tax amounts per taxing authority. Tax rate searches can be saved into the program's Favorites file.

Filing, Electronic Compliance & Payment — 3 Stars

BNA Sales & Use Tax Rates and Forms is designed for preparing, printing and filing signature-ready, paper-based sales and use tax reports, and does not offer any e-filing or electronic remittance options. Forms are approved by all jurisdictions and can be printed on regular blank paper.

Rate Updates — 5 Stars

For the CD-based version of the system, tax rate updates are included with the product and are available via two methods: monthly CD updates and weekly updates downloadable from the BNA Software website. The web-based system is continually updated by BNA Software.

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Relative Value — 4.5 Stars

With support for all jurisdictions in the United States, the BNA Sales & Use Tax Rates and Forms system is clearly designed for businesses with the need for multiple state compliance or, perhaps even more so, for professionals providing compliance services to multiple businesses. The program's simple rate lookup functionality is appreciated, and its comprehensive collection of state and municipal forms is impressive for a moderately priced system.

2007 Overall Rating: 4 Stars

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