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SALES TAX

2012 Review of BNA Software – BNA Sales & Use Tax Forms & Rates

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BNA Software – BNA Sales & Use Tax Forms & Rates – 6406

www.BNAsoftware.com

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Best Fit:

Preparers responsible for mid-sized and larger business sales tax and use tax filings who have broad reporting obligations across multiple, varied jurisdictions. The application also provides comprehensive rates tables which can be imported into many accounting systems.

Strengths:

- Comprehensive rate tables include all U.S. jurisdictions

- User-friendly web-based interface allows anytime, anywhere access
- Multiple reporting, data and rate table output options
- Management of compliance for multiple entities
- Ability to schedule rate table export

Potential Limitations:

- Rate lookup and return preparation not integrated
- No e-filing or electronic payment options

The sales and use tax programs from BNA Software are available in online versions. Available modules include tax rate lookup, exporting of tables for accounting systems, and a library of more than 3,400 ready to file government forms, instructions, exemption certificates and miscellaneous documents such as powers of attorney and business registrations. The online versions of BNA Sales & Use Tax Rates and BNA Sales & Use Tax Forms are separate programs that focus, respectively, on rate lookup and form preparation, but are both reviewed here.

Basic System Functions

The Forms program is geared on direct preparation of sales and use tax returns for all U.S. jurisdictions. After logging into the secure, web-based system, the program offers a traditional user interface that resembles a locally installed program. General navigation features include pull-down menus and icons, plus easy access to form selection lists. Initial setup of entities and preparers is guided by the program. The system can support any number of business entities, making it also appealing to professionals providing compliance services to multiple businesses.

Once business data has been saved to a profile, its information is automatically populated on all returns prepared with that profile, for all taxing agencies. The system's data entry screens are based on form replicas that automatically calculate and transfer data as needed, with right-click links to official form instructions, calculation overrides and font selection.

The interface for the rate lookup system is also web-based and appears more so than its counterpart system, and provides options for searching the rate database by ZIP Code, state, city, county or special districts. The system displays results on a single screen that shows applicable rates at all levels. BNA Software's database tracks prior and current rates, as well as special taxability notes, including maximum levels, overrides and combined/split rates. The rate tables can also be exported for use in accounting systems, providing real-time lookup during transaction entry.

Compliance Capabilities

BNA Software claims that the rate tables include more than 58,000 jurisdictions in the United States, including all states, cities, counties and special districts who levy sales and use taxes. The system also contains all of the special taxability rules. The Forms program offers more than 3,400 returns, exemption certificates and general business forms at the state and local levels, all of which can be populated with general business data and tax identification numbers (although transaction data must be entered manually).

BNA Software's systems do not provide e-filing or remittance of collected taxes to taxing authorities, and require print preparation and filing of forms, or manual e-filing through a state's online filing website, where available.

Since the programs are web-based, the tax rate tables are constantly updated by accounting and technology professionals at BNA Software. For businesses importing the rate tables into their accounting systems, exporting of rates can be performed at any time, or can be scheduled to automatically occur at specified intervals and during off-peak times.

Integration/Import/Export

The core integration feature is in the BNA Sales & Use Tax Rates system, which allows the tax tables to be saved into Excel, CSV, text or PDF formats. These tables can be imported into most general small and mid-sized accounting systems. The program also offers generation of all reports, forms and instructions into PDF format.

Help/Support

The BNA Sales & Use Tax Forms system offers generous support options, including a traditional help menu, user manual and tutorials, and right-click access to instructions for all forms. Additional online resources include FAQs, white papers, webinars and training options. Live and web-based technical support is included in pricing.

Summary & Pricing

BNA Sales & Use Tax Rates and BNA Sales & Use Tax Forms are two separate programs which can be used individually or together, depending on business needs. The Rates system provides comprehensive rate tables across all U.S. jurisdictions, and offers exportable tables that can be imported into accounting systems. The Forms program offers similarly comprehensive access to print-ready returns, instructions, exemption certificates and common business forms for all states and localities. Neither system offers integrated e-filing capabilities. Together, the systems start at about \$1,000

each per year or \$1,800 for both, which allows unlimited access to forms and constantly-updated rate tables for all U.S. jurisdictions.

Sales Tax • Technology

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