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

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www.taxtools.com

From the July 2013 Review of Sales and Use Tax systems.

Best Firm Fit: Accounting professionals responsible for preparing sales tax returns for small and medium sized businesses with multiple locations in California or New York

Strengths

- User interface is intuitive and easy to use.
- The application creates most ancillary documents associated with assembling a paper return, including invoices, cover letters, fax cover sheets, mailing labels, and envelopes.
- Supports multiple entities and clients in the same application.
- The California application supports e-filing and remittance from within the application.

Potential Limitations

- The company only offers sales tax products which support the states of New York and California.
- The products do not have integrations with accounting systems.

Overview

CFS Tax Software's CA Sales Tax Preparer and NY Sales Tax Preparer applications are

application. The New York application performs the calculations needed before the user enters their data into the NYS Department of Tax & Finance Sales Tax Filing website. The applications will also prepare printed or PDF forms which can be used to file on paper.

Once converted to the network version of the application, the software can be used by an unlimited number of preparers in a single office. Updates to the application are issued quarterly for California and monthly for New York, and the updates for each year's application are included with the purchase price of the application.

The application prepares filing instructions, transmittal letters, invoices, and other routine client correspondence. Other reports such as a Gross Sales Summary can also be prepared with this software. Data can be shared between some applications by this publisher (see website for details), but information cannot be imported from other applications. Client information is stored in a client database, which can be used to automatically populate new forms and returns.

The program includes training videos and a well-documented help file with line by line instructions. Support is included with each year's version of the application, and is provided by telephone, chat, or remote access.

Summary & Pricing

The annual versions of CFS Tax Software's CA Sales Tax and NY Sales Tax Preparer applications start at $119 and $169, respectively, for new users.

Customers of prior versions of the application receive a $20 discount on the current year's software. An upgrade to convert either application into a network-based application is $50 per year.

2013 Ratings:

Sales Tax • Small Business