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CFS Tax Software has been providing various accounting and small business software since its founding in 1989, with its most popular applications including live and after-the-fact payroll and wage reporting, W-2 and 1099 reporting, and property tax compliance. The vendor also offers various programs for Schedule D basis tracking, tax planning, retirement and financial utilities. The company's sales and use tax systems are designed for filing in California and New York, with online utilities for submission of returns and payments. This review examines the CFS CA Sales Tax Preparer system.

Basic System Functions

CA Sales Tax Preparer is a traditional program that can be located on desktop or laptop computers, or on file servers, with a quick and simple installation process. The system opens into a multi-paneled interface with large icons for basic client management functions, along with a client selection list and access to a built-in forms library. Tools and utilities include backup and restore functions; customizable configuration options for setting defaults for printing, fields, fonts and colors; and the ability to set up automated web-based program updates. The system can be used to manage any number of businesses with taxable retail or resale transactions. The program automatically maintains prior period filings, but these returns aren't viewable across multiple businesses or via a list view. 4.25

Compliance Capabilities

CA Sales Tax Preparer can handle filing for entities with multiple jurisdictions within

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client data and paid preparer data pre-populated. The remainder for the form provides tab or mouse navigation between fields, with calculations performed automatically, but overridable. Rate calculations are applied based on the most recent rate table updates for the state and local jurisdictions. Links are available for associated schedule and worksheets (A, B, C, G, 1150, etc.).

From the form data-entry screen, users can either print returns or file electronically through a built-in link to the BOE's eServices website, which opens in a new window. Rate updates are available either by mailed CDs for an additional cost of $25 per year, or can be downloaded free from the CFS website. The system can also be set to automatically check for program and rate updates. 3.75

Integration/Import/Export

The CA Sales Tax Preparer system automatically saves prior period returns into client folders, but the primary way for accessing specific forms is from the Module Library tab at the bottom of the home screen, with the program displaying which prior periods have associated returns. In addition to the primary returns, the program includes templates, cover letters, invoices, filing instructions, a label maker and gross sales summaries. Forms and reports can be printed or saved within the system, but no other formats are offered. However, it can be used with the PDF making program PDF995, which must be installed separately. While data can be imported from other CFS programs, few options are available for exporting data into importable formats. The system would definitely benefit with the addition of output into common file types and the ability to save reports and client communication into Microsoft Office formats. 2.75

Help/Support

CA Sales Tax Preparer provides a basic built-in Help utility, field-specific instructions

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They are best suited for small businesses doing business exclusively, or almost so, in either state, but with multiple locations or additional taxation issues that make using a formal preparation system more convenient. The system can also be used to manage multiple entities.

2010 Overall Rating 3.75

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