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entities, both products are truly designed for the tax professional, though businesses ...

Mary Girsch-Bock • Jun. 13, 2016



From the 2016 reviews of Sales and Use Tax Systems.

### **Product Strengths:**

- The majority of tax rates are updated every 30 days to ensure accuracy, however, some changes are published as they become available
- The product offers an intuitive interface and provides users with several tools that can automate the lookup and rate monitoring process considerably
- Good export capability allows users to easily export rates for review and compare to other sources or import into third party accounting applications
- Tax forms can be easily completed online, with automatic calculations and the ability to save all forms as a PDF file

### **Potential Limitations**

- E-Filing and electronic payment capability is not supported at this time

**Best Fit:** Mid- to large-sized businesses, accounting firms and tax preparers that

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product as well.

BNA Sales Tax Rates offers rates for over 58,000 state, city, and county tax jurisdictions, as well as Canada and Puerto Rico. Search capability is robust in BNA Sales Tax Rates, with users able to search for rates based on city, county, zip code+4, or address. Rates are updated at least every 30 days, with users able to easily search the system for any rate changes as far back as January 2012. Tax rates can be downloaded in a variety of file formats including Excel, making it easy to import downloaded tax rates into third party financial applications. In addition, users can import addresses from Excel or lookup jurisdictions manually, tag them as favorites, and receive automatic email alerts whenever there are changes to the sales and use tax rates, even when the taxing authorities publish changes after the effective date.

### **E-Commerce and Automation:4 Stars**

BNA's system is primarily intended for use as a look-up resource, or to have the data imported into a financial system. The Sales & Use Tax Navigator found in BNA Sales Tax Rates, offers an easily navigated user interface that utilizes a single interactive screen. The navigator is organized by state, and provides detailed information about each state's sales and use tax law as well as tax rates, taxation of services, filing requirements for each state, and more. Users can save frequently accessed jurisdictions in the Favorites section of the product, which will display upon login.

The screen also contains tax effective dates and any prior rates, as well as special district taxes, combined or split rates, tax override rates, and maximum tax levels. The 'Compare States' option allows users to compare a single tax section in all 50 states. A calculator is included with the product, so users can easily calculate tax liability based on any taxable amounts entered.

### **Reporting Tools: 4.25 Stars**

BNA Sales Tax Rates offers users a library of 3,400 local, city, and state sales and use

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enter data directly into the form, saving a considerable amount of time. Users can create separate profiles for all businesses that require form filing, adding dues dates and other details related to that business. When forms are due, they will then prepopulate with the data saved for that particular business. At this time, BNA does not offer e-filing or electronic tax payment capability, so any forms filled will have to be printed and filed independently, either by mail, or online.

Users can save all forms as a PDF file, and the product also offers automatic calculation ability, ensuring that all forms are populated with accurate, up-to-date rates.

### **Integration: 4.5 Stars**

The Rates Exporter function allows users to create an automatic report of tax rate data that can be scheduled to run at designated intervals. Users can automatically export sales and tax rules using the optional Rates Exporter module at any time by selecting the jurisdictions desired as well as a file format. BNA Sales Tax Rates supports multiple formats including XLS, XML, CSV, and Txt. Exports can be scheduled to run automatically, with users choosing the appropriate intervals which can include weekly, monthly, quarterly, or yearly. Users can also opt not to schedule any export files at all. On the date selected, the export file is delivered to a specified email address in a zip file, which can be downloaded directly into an accounting program.

BNA Sales Tax Rates can be used as a stand-alone product, or with other BNA tax products.

### **Support: 5 Stars**

Product users will have access to free, unlimited toll-free support during regular

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management capabilities in-house. The product is available as an online subscription, with pricing starting at around \$2,500per year.

## 2016 Overall Rating: 4.5 Stars

Automation • Sales Tax • State and Local Taxes

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