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products, along with financial planning tools and a payroll software system. The tax preparation system only offers sales and use tax processing for California and New York.

Mary Girsch-Bock • Jun. 13, 2016

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From the 2016 reviews of Sales and Use Tax Systems.

Product Strengths:

- Product can be easily downloaded from CFS website
- Return users simply pay a renewal fee each year
- Product offers solid integration with other CFS products
- Product allows users to create an entire packet of documents for each client which includes cover letters, a client invoice, mailing labels and envelopes

Potential Limitations:

- Product is only available for those filing California and New York sales and use tax

- Product offers limited integration with other financial and accounting

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preparation system only offers sales and use tax processing for California and New York. For those that need to process California state sales and use tax, users can choose from a variety of products including the California Sales Tax Preparer system, which is suitable for new users. Those already using the product can choose a renewal or network upgrade if desired.

CFS's California Tax Preparer product allows users to electronically file California returns, print invoices for fee collection, and print a cover letter with client filing instructions. CFS provides quarterly tax updates and can be downloaded from the CFS website at any time after release. While the product is set up to process file returns electronically, users can also print sales tax returns and submit the return with payment, or simply send tax payments separately.

E-Commerce and Automation: 3.75 Stars

The CFS systems are both intended as after-the-fact sales tax reporting programs, and do not offer direct integration with e-commerce systems for live transactions. The interface for both the California and the New York Tax Preparer software is similar, with the ability to quickly add, edit, or delete a client. Users simply add a client and have the option to submit payment by ACH debit by entering banking detail in the client profile. If payment is not submitted using the ACH debit option, it must be submitted separately as an electronic payment, or with a prepared check.

Users can quickly find an existing client by accessing the client list, and the client folder contains all of the documents that have been processed and filed on behalf of that client. The Module Library, found below, offers access to all of the forms available for each particular state. Help functionality is available throughout the product, and users can easily magnify the form view for easy form viewing and completion.

Forms available for California include the following:

- Main Form 401

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The state of New York requires direct submission of all tax forms to the New York State Department of Taxation and Finance, so users cannot file electronically using CFS, but must enter information using the New York State Department of Taxation and Finance website to enter information. The product will allow users to create the necessary forms in CFS that need to be filed via the website. These forms include:

- Form ST-100 Quarterly Sales and Use Tax Return
- Form ST-810 Quarterly Sales and Use Tax Return for Part-Quarterly Filers
- Form ST-809 Monthly Sales & Use Tax Return for Part-Quarterly Filers
- Form ST-101 Annual Sales and Use Tax Return
- Form FT-943 Quarterly Inventory Report by Retail Service Stations and Fixed Base Operators
- Form FT-945/1045 Report of Sales Tax Prepayment On Motor Fuel/Diesel Motor Fuel
- Schedule A Taxes on Selected Sales and Services in Nassau and Niagara Counties
- Schedule FR Sales and Use Tax on Motor Fuel and Diesel Motor Fuel
- Schedule H Report on Clothing and Footwear Sales Eligible for Exemption
- Schedule N/N-ATT Selected Sales and Services in New York City Only
- Schedule P Sales Tax Prompt Tax Payments
- Schedule W Report of Sales to a Qualified Empire Zone Enterprise (QEZE)
- Form OS-114 Connecticut Sales and Use Tax Return
- Forms AU-11, DTF-17, DTF-4/4.1, DTF-80, DTF-95, DTF-96, DTF-280, ST120, ST120.1, ST-330, Pub. 910

Reporting Tools: 4.5 Stars

New York State tax rates are updated yearly, in April. The New York Sales Tax Preparer product also produces client invoices, cover letters, and fax sheets for more expedited

tax filing, and the cost of the New York product is also less than its California

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Both products integrate with other CFS software products including CA 571 Preparer, which prepares a California Business Property Tax Statement, the Tax Corresponder, which provides users with templates that can be used for processing client correspondence, the W4 Calculator, which allows payroll adjustments throughout the year, and MD Personal Property, which prepares Maryland Personal Property Returns. Also available are Financial Planning Tools, Small Business Tools, and various paper products such as forms, envelopes, custom folders, and business checks. CFS also offers a comprehensive payroll product that also files all payroll tax returns electronically. The product does not offer an option to export data into a third-party accounting application at this time, nor does it provide integration capability with other accounting systems.

Support: 4.75 Stars

The product offers good help functionality, with users easily able to locate help files as needed. CFS also offers a central location on their website where users can quickly access product installation instructions, instructional videos, tax related links, FAQ's. Technical support requests are also processed from this location, as are chat and remote support requests.

For those that need to file California and New York Sales and Use Tax, CFS is an affordable, easy to use solution. The product can be downloaded immediately upon purchase, and a demo is available for users to try out prior to purchasing. While the form creation is notable, the product's ability to complete and in California's case, electronically file sales and use tax returns is laudable.

Both the California and New York Sales Tax Preparer software is reasonably priced, with the California version currently running \$119.00 for new users, and \$99.00 for renewals. New York pricing is \$84.50 for new users, with renewals running \$74.50. Users can also choose to add a network upgrade to each product for \$50.00.

2016 Overall Rating: 4.25 Stars

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