

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

## REVIEWS

# 2019 Review of CA and NY Sales Tax Preparer

Mary Girsch-Bock • Nov. 18, 2019



**CA Sales Tax Preparer**

**NY Sales Tax Preparer**

**CFS Tax Software Inc.**

[www.taxtools.com](http://www.taxtools.com)

[From the 2019 reviews of sales tax compliance systems.](#)

CFS Tax Software Inc. offers sales tax software for accounting professionals that need to calculate, print, and file California and/or New York state sales and use tax returns for their clients. In fact, CFS is billed as the first sales tax application that allows electronic filing of California sales tax returns. In addition to the sales tax preparer

applications, CFS also offers a number of other resources including payroll, W2/1099 form processing, and TaxTools, which offers complete tax planning capability.

CFS easily handles multiple companies and allows users to add, edit, or delete clients at any time. A handy feature is the ability for CFS to create a professionally prepared packet for each client, with a cover letter and client invoice included with a copy of the completed return. All client tax forms are saved in an individual client folder for future access, with users able to import prior year data when necessary. Users can also save all returns as a PDF, with the ability to print and mail forms as needed

CF releases product updates throughout the year, with tax updates released quarterly. The product is designed as an after-the-fact tax preparation application and does not offer integration with any third-party accounting or point of sale applications.

Both products offer a similar user interface, with only the CA Sales Tax Preparer offering electronic submission of prepared forms. California users can also print forms and file returns by mail. California forms and filings supported include:

- Main Form 401Main Form 401
- Short Form 401-EZ
- Schedule A for District Tax
- Schedule B for Local Tax
- Schedule C for Allocation by Suboutlet
- Schedule G for Gasoline Sellers
- Form 1150 for prepayments
- CDTFA 65, 91, 101, 135-A, 230, 345, 392, 400-MCO, 400-MIP, 400-MT, 400-SPA, 401-DS, 401-E, 468, 531-G, 735, 501-ER Electronic Waste Fee, 501-TF Tire Fee, 501-TK Storage Tank Fee

Unlike California, New York State requires that filers directly submit all sales and use tax forms via the New York State Department of Taxation and Finance website, so there is no option for printing and mailing forms for NY users. Forms and filings available for NY 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

Along with sales tax preparation, CFS also offers a variety of other products including payroll, financial planning tools, and tax planning tools such as Tax Tools.

CFS offers product users good help functionality, with resources such as installation instructions, instructional videos, and FAQs available from the CFS website. Users can request technical support using the form on the website, or contact support via chat, with a remote support option available as well. In-product help is also offered throughout the application.

CFS CA and NY Sales Tax Preparer is a good sales tax solution for accounting firms that need to file sales tax returns for clients in either state. Those interested can download a demo directly from the CFS website to try out prior to purchasing. If a decision to purchase is made, CFS can be downloaded directly from the CFS website and installed on a desktop, workstation, or laptop computer. CA Sales Tax Preparer for a first-time user is currently priced at \$119, with the annual renewal running \$99. The NY Sales Tax Preparer is currently priced at \$84.50 for a first-time user, with the annual renewal running \$74.50. A network upgrade for either product is also available for an additional \$50.00.

**2019 Overall Rating: 4.25 Stars**

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved