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CFS Tax Software's CA Sales Tax Preparer and NY Sales Tax Preparer applications are full-featured standalone tools for preparing New York and California sales tax returns for multiple clients. The applications support all state, city, county, and other special districts which levy sales taxes in the two states. The products also support most major forms needed to file returns; complete lists are at

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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 CA Sales Tax Preparer are issued quarterly whereas updates to NY Sales Tax Preparer are issued monthly. Updates for each year's application are included with the purchase price of the application.

Data can be shared between this application and many of the publisher's other applications (see [www.taxtools.com](http://www.taxtools.com) for details), but information cannot be imported from popular third party accounting or point-of-sale solutions. Client information is stored in a client database, which can be used to automatically populate new forms and returns. Upgrade to a network version is also available for an annual fee of \$50 per application.

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 it is provided by telephone, chat, or remote access.

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

### **Strengths:**

- The user interface is easy to navigate and understand.
- Unlike a traditional forms application, which creates only the requested forms, the CFS CA and CFS NY Sales Tax Preparer applications will create the paper required to assemble a client copy of a return including invoices, cover letters, mailing labels, and envelopes.

- The solution allows the firm to store its information, as well as data from multiple

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with the requirements of New York and California. CFS does not offer compliance solutions targeted at the other 48 US states or any US territories.

- New York requires users to enter their sales tax returns on a secure website, and it does not support direct transmission of returns from within the application.
- The applications do not integrate with any popular accounting or point-of-sale applications like QuickBooks or Sage 50 (Peachtree).

## Summary and Pricing

The annual versions of CFS Tax Software's CA Sales Tax and NY Sales Tax Preparer applications start at \$119 and \$84.50, respectively, for new users. Customers of prior versions of the application receive a discount on the current year's software. An upgrade to convert either application into a network-based application is \$50 per year.

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