

# Honest Feedback From Real Users of Sales Tax Software



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## Ascertaining Taxability and Identifying Appropriate Jurisdictions Are Menacing Sales Tax Problems

*Reduces the time it takes to complete complicated sales tax forms, while ensuring that there is room for the expert's judgment.*

Jurisdiction and taxability are fundamental to filing sales tax returns – and accuracy is paramount. This year's sales tax software vendors strive for usability through innovative web technologies, enhanced data export and analysis, and efilg. The objective is to offer practitioners a toolset that reduces the time it takes to complete complicated sales tax forms, while ensuring that there is room for the expert's judgment. Since the software does not have all the answers, flexibility is crucial to ensuring that the data reflects the reality of your business.

### Determining Taxability and Jurisdiction

Ascertaining the taxability of certain goods and services and identifying the appropriate jurisdictions are the two most menacing sales tax problems you will face. A wrong choice cascades through the entire filing and could unnecessarily cost you thousands of dollars. Taxability does not always stay in one place, requiring that sales tax solutions allow some flexibility for the user's judgment. Jurisdiction, as well, may change over time, rarely adhering to zip codes or other signposts. This year's solutions keep the user in control with features that make room for knowledge and experience. End users can adjust the software as necessary to ensure that the appropriate products are deemed taxable according to the right jurisdictions.

### A Single Source of the Truth

Many users cite central management as a particular advantage of this year's packages. For example, instead of running software from multiple vendors, businesses can consolidate around one software product, saving time and money while preserving accuracy and data integrity. Centralized sales tax software also facilitates faster, more detailed reporting. Reports come from one database in each of these products; users will not have to piece together files from multiple sources to gain a complete view of the enterprise. Practitioners have direct access to the truth with only a few clicks; they can remain confident that the data is accurate because the risk of human error is mitigated through centralized management.

Most of all, users say sales tax software is becoming easier to use. While features that allow practitioner judgment and provide for centralized management are helpful, the vendors are continuing to refine their applications to make data entry faster and verification more complete. Users indicate that the large filing volumes they face could be impossible to complete without these robust tools. Ultimately, the practitioner's goal is to file the correct information as quickly as possible. The packages represented here are designed to help you do it right ... the first time.

### **Bruce Andersen, Executive Editor-Practice Management says,**

In my office, I can still do most of the sales tax returns by hand – but there is a bigger issue for me. I have a few clients that now have multiple office sales activities and have equipment in various locations on lease. This is a nightmare to try to do by hand. Sales tax software is very efficient for the accountant and can be a huge benefit to the client if audited by a sales tax authority.

# Taxability Decisions Improved Through Global Engine

*The combination of a tax engine and tax research accommodates millions of complex scenarios, including exemptions, special rates, caps and thresholds.*

**A**D P's Taxware Enterprise is a global tax engine designed for multinational corporations. Supporting the United States and nearly 200 foreign countries, Taxware Enterprise manages compliance, increases productivity and optimizes cash flow, while decreasing tax liabilities and audit exposure.

## Benefits and Features

- Built on industry standard Java 2 Enterprise Edition (J2EE) framework for maximum flexibility, Taxware Enterprise is platform independent and designed to run in any environment.
- The combination of the Taxware Enterprise tax engine with ADP's proprietary tax research offers the latest tax rates and rules, and can accommodate millions of complex scenarios, including exemptions, special rates, caps and thresholds.

### What Users Say

**Michael Figueroa**, senior vice president of Tax Governance/Technology for Countrywide, was an early adopter of ADP Taxware Enterprise. "One big reason we chose it was because of ADP Taxware's relationship with PeopleSoft. We've integrated the two, with PeopleSoft sending all tax-related decision-making to Enterprise. The calculated tax is automatically recorded in our general ledger and integrated into our tax returns. The improvement in the accuracy of Countrywide's taxability decisions has been tremendous."

ADP's Taxware Enterprise solution also saves his staff time, allowing them to find and limit exposure, and find overpayments. "We used to spend two or three weeks working on compliance research and issues. Now, we spend two or three days!" Figueroa also appreciates that technical support is very well versed in how businesses work from an IT perspective. "That makes troubleshooting and the tech support process much more efficient."

## Summary

Domestically, Taxware Enterprise helps corporations comply with tax laws, including Sarbanes-Oxley, and features tax content certified by the Streamlined Sales Tax Governing Board.

## Taxware Enterprise from ADP

[www.taxware.com](http://www.taxware.com)  
877-829-9273



## BNA Software

[www.bnasoftware.com](http://www.bnasoftware.com)  
800-424-2938

# Tax Rates Accessed Immediately

*Offline version includes monthly CD updates and weekly downloadable rate updates.*

**B**NA Sales & Use Tax Rates and Forms is a lookup and compliance system that can be used with just rates or just forms, or as a comprehensive system that includes a rates file generator for integration with accounting systems. Similar to other solutions, BNA Software has also moved to the Internet, providing a new web-based solution that shows the functionality of the CD-based product in an online environment.

## Benefits and Features

- Provides immediate access to the latest rates by ZIP code, city, county or state.
- Automatically delivers new rate updates.
- Optional Rates File Generator exports correct rates to a CSV text file that may be used to import the data into sales or financial systems.
- Users can fill in forms on-screen with automatic calculations built into the program. All forms are government approved for filing.

### What Users Say

**Karen Udvarhelyi** of Horizon National Contract Services in Red Bank, N.J., says she couldn't live without BNA. "We have 10,000 locations. At any time, when I need to look up the tax rate in a city or county, it takes just a split second."

"Nine times out of 10, states submit returns at least one week late," says **Sandie Crue**, a tax manager with Avatech Solutions, Inc., in Owings Mills, Md. "With BNA Sales & Use Tax Rates and Forms, I can go online anytime and pull copies of state returns. It makes my job so much easier."

## Summary

The BNA system supports all U.S. tax jurisdictions, including rates for nearly 60,000 cities and counties (broken out by jurisdiction), and forms for more than 2,000 government entities. The service is available as an online application or as a CD-based program.



# Stand-Alone System Offers Rates Across North America

*Through a viewable interface, users can view complete tax rate structures and calculate the tax liability on any given transaction.*

**C**CH ZIPSales Look-up is a stand-alone sales tax look-up and tax calculation system that provides sales and use tax rates for every ZIP code, city, county and state in the United States, its territories, and Canadian GST and provincial taxes. With data designed to be easily integrated into the user's work flow, ZIPSales Look-up contains a viewable interface so users can view complete tax rate structures and calculate the tax liability on any given transaction.

## Benefits and Features

- Since taxing jurisdictions do not always conveniently line up with ZIP codes, ZIPSales Lookup allows users to view all locations served by each ZIP code, with city and county defaults by population for ZIP codes that cross jurisdictions.
- Users can print tax rate directories by county, city, ZIP code or on a state-by-state basis. All changes can be viewed and printed dating back to Jan. 1, 1994.

### What Users Say

**Rick Calich**, manager of Tax Systems with Sherwin Williams in Cleveland, Ohio, has used this ZIPSales since 1994. "We originally used it as part of a project we were doing with a compliance product. Our POS system was homegrown, so by using home location and ZIPSales, we were able to track rate changes for more than 3,000 stores. In ZIPSales, you are able to create what CCH refers to as "OWN" locations. Every time there is an update, you can look and see if those particular rates have changes – as a result, we can automatically keep up with all changes. ZIPSales also has a relatively low cost, so a small business is not paying an arm and a leg."

## Summary

ZIPSales Look-up is part of CCH's end-to-end sales tax compliance suite of products, and is flexible enough to cover single rate look-ups or track sales tax rate changes for thousands of store locations.

CCH, a Wolters Kluwers business

www.ccb.com  
800-630-2218



# Quick Learning Curve Enables Efficient Use

*All calculations and transfers between forms are done automatically, including vendor credit.*

**N**P Systems' Sales Tax Reporter provides easy collection of data with automatic printing of the forms needed for government reporting purposes.

## Benefits and Features

- Sales Tax Reporter can print groups of returns, or just a single return or form from a single return. Blank forms also can be printed.
- All calculations and transfers between forms are done automatically, including vendor credit.

### What Users Say

"Sales Tax Reporter is a time saver, and that's the principal benefit," says **Christopher Smith** of Staten Island, N.Y. He's has used Sales Tax Reporter to prepare reports for his clients for 15 years. "We also use the Complete Payroll System to prepare tax returns, W2s and quarterlies, and print payroll checks for our small business clients. It saves us an awful lot of time, especially at year end." nP Systems' tech support is excellent, according to Smith. "I had a question last week; I gave them a call and had an answer in 30 seconds."

"I've have used nP for my Payroll and Sales Tax in my accountant consultant practice for almost 20 years," says **Dominick Rosa** of Manhasset, N.Y. "It is a stable product from a stable company. Once you become familiar with the software, it is second nature and very easy to use. I'm able to process 50 quarterly returns – inputting data and printing them out in less than an hour." Rosa also says he found the price point to be very reasonable and customer support responsive.

## Summary

Sales Tax Reporter's intuitive design customizes to user needs, with automatic transfer of amounts between forms. This program gives users the ability to calculate and generate the complete set of NY, NJ and CT state tax forms on a laser printer.

nP Systems

www.npsystems.com  
800-273-6889



## Flexible Data Options Integrate With Many Financial Systems

*InSource includes more than 560 different returns for sales, consumer's use, seller's use, rental and leasing.*

InSource Sales & Use Tax from Thomson Tax & Accounting is designed to save end users considerable time and energy by helping practitioners keep up with hundreds of changes to tax returns, tax rates and tax law.

### Benefits and Features

- InSource Sales & Use Tax helps ensure accurate, timely filing of sales and transaction tax returns for multiple jurisdictions, including more than 560 different returns for sales, consumer's use, seller's use, rental and leasing.
- Flexible data collection options allow for a high degree of integration with virtually any financial system.
- All tax returns and required schedules are exact copies of the official forms instead of crudely-designed replicas or workpapers.

#### What Users Say

**Cynthia Richardson** of Miller Zell in Atlanta, Ga., works in the retail store development industry. "InSource helps us keep up with the sales and use taxes we charge our clients. We remit an average of 1,000 tax returns per year. Before InSource, we downloaded data into a spreadsheet, which took days. In six years, I've called for help only twice and Thomson has been able to fix the problem."

"By automating the filing of our tax returns, we can file for 8,000 stores in one week," says **Jim Bryant** of Dollar General in Goodlettsville, Tenn., who has used InSource since 2003. "We can download data from our general ledger system to the tax returns. There is a master location file with the addresses of all the stores. The software maps the correct tax and jurisdiction, including reduced rate sales that support the grocery business."

### Summary

According to Thomson, preserving customer resources is one of the company's primary goals. With InSource, customers report near-universal acceptance by the taxing authorities based on exact replicas of official forms.

**Thomson Tax & Accounting**  
www.thomson.com  
800-327-8829

**THOMSON**  
★  
**TAX & ACCOUNTING**

## Update Feature Pulls Data From Year to Year

*Payment warehousing in states that allow it allows for greater control over cash flow.*

The advantages of e-filing are clear: the process is typically faster, more efficient and offers more control. This is especially true with Trustfile, which boasts several helpful features, including data import from most spreadsheets rather than re-keying pages of numbers manually, and auto calculation of simple math to help filers avoid audit-triggering errors.

### Benefits and Features

- File for multiple companies.
- Perform and check simple addition and subtraction automatically.
- Ability to import return data from an industry-standard format.

#### What Users Say

**Elizabeth Maxwell** of Amelia Island Resort in Florida has used Trustfile to file returns electronically for eight years. "It's very user friendly and simple to use. I love it. Years ago, we had to file over the phone, call the state and enter a bunch of numbers. Occasionally, however, I'll get a message that I need to update. When the updates are complete, I get thrown out of the program. That's annoying. I could choose to update later, but updates are important."

**Lee Bice** is an IT manager for Goodwill Industries, Suncoast, Inc., a nonprofit agency providing human services, outpatient and residential corrections facilities, as well as retail stores in 11 counties, in Florida. The agency uses Trustfile for unemployment tax. "The Sales Tax software is new to us; we made the transition from another software that gave us a little bit of difficulty at year end," says Bice. "I like Trustfile's responsiveness to our needs. To me that's everything! In the future, year-end will be easier. Trustfile has an update feature that pulls data across year to year."

### Summary

Trustfile's sales tax software is an easy-to-use program that allows you to quickly and securely fill out and submit sales tax returns.

**Trustfile**  
www.trustfile.com  
877-222-0187

**Trustfile**<sup>™</sup>  
MAKING BUSINESS TAXES LESS TAXING

# Centralized System Offers Easy Data Access

*The Taxability Manager provides a flexible workbench for defining the taxability for the products or services they purchase or sell.*

Vertex O Series for sales, consumer use, lease and value-added taxes uses web services technology to deliver robust compliance capabilities.

## Benefits and Features

- Centralized Tax Management – This scalable, platform-independent solution enables the tax department to centralize tax management, transaction processing and reporting.
- Flexible Taxability Determination – The Taxability Manager is a web-based tool that provides the tax professional with a flexible workbench for defining the taxability for the products or services they purchase or sell.
- Precise Jurisdiction Identification – Vertex TaxGIS processes the addresses on a transaction to determine the precise set of tax jurisdictions for the location.

### What Users Say

“The software calculates sales tax with 100 percent accuracy based on customer, product and ship-to state,” says **Denice Haslett**, a corporate tax accountant for WS Packaging in Algoma, Wisc., who has used Vertex for 18 years. “It eliminates future audit assessments and sales tax penalties. All the information is stored, so I can answer customer questions about what line items were taxed at what rate.”

**Bahar Limaye** is an applications architect at The College Board in Reston, Va. Before switching to Vertex O Series, the company had outsourced taxation. “We wanted to centralize our tax management and move away from relationships with multiple vendors. We’ve been using it since December 2003 with great ROI.” Employees across the company use the software. “The tax people use it for monthly updates, and to export tax information for sales tax returns; the business people use it for reports; and the software engineers use it for quality assurance.”

## Summary

Vertex O Series supports a centralized approach in which multiple systems access a single central tax server, enabling efficiency, control and consistency for all tax calculations.

Vertex O Series  
[www.vertexinc.com](http://www.vertexinc.com)  
800-355-3500

