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*From the August 2009 Review of [Sales](#)
& Use Tax Programs*

Designed for businesses with sales and use tax liabilities in a few states, TrustFile provides compliance capabilities that include e-filing and electronic remittance of liabilities. Individual TrustFile programs are available for Connecticut, Florida, Georgia, Illinois, Louisiana, Maryland, New Jersey, Pennsylvania, South Carolina, Tennessee and Wisconsin, with each supporting all taxability rules and local and special entity jurisdictions within those states. With all state programs combined, the TrustFile system was used by more than 7,000 businesses in 2008 to file and remit more than \$11 billion in sales and use taxes.

The TrustFile systems support an unlimited number of businesses/tax IDs but are sold in increment of five, and all maintain a generally similar interface, although each state program runs independently of the others. Pricing is normally \$159 for a single user for each state program, but is currently discounted to \$99 each. TrustFile's parent company Avalara offers other sales and use tax applications, including the automated AvaTax system.

Navigation & Data Entry:

After initial setup of taxpaying business entities using the South Carolina version of the system, the primary TrustFile interface offers a basic screen with options for selecting the business and filing period, working with sales tax information, editing payment/banking information, printing returns, and electronically transmitting returns to the state entity.

Users can look up prior-period returns from a spreadsheet selection list, or can initiate a new return period. After selecting the period dates, data

is entered on a series of worksheets that allow for entry of base data, with

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Peachtree and Excel documents. The system can be used to manage sales taxes for up to five separate businesses, offers e-file and e-payment options, and includes backup and restore functions.

Filing, Electronic Compliance & Payment:

After preparation of a return using the TrustFile system, it can be electronically submitted to those states that mandate or offer e-filing, and can also be printed to hard copy or saved as a PDF. Users can view on-screen versions of the forms prior to transmission, and the program offers proof of electronic submissions of returns and remittances. Returns are archived in the program for future access.

Rate Updates:

TrustFile users can download tax table updates at anytime for free from the vendor's website or can opt to have the updates mailed to them monthly for \$50 per year. The system also has an auto-update feature that checks the support website for updates and installs them when available.

Help/Training:

The various state versions of TrustFile are all very simple to use, providing basic Help utilities plus electronic user guides and filing instructions. The vendor's support website offers tax table and program updates, tax resources, program documentation, online manuals, newsletter, alerts, FAQs and a knowledgebase, plus links to support and contact information for state and local taxing jurisdictions. Support is included in program pricing, with an optional premium Gold plan available.

Relative Value:

TrustFile provides an extremely easy-to-use system that specializes in sales and use tax compliance for the 11 state versions of the program. It can be used

in-house by businesses or as a client service application by professionals,

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