the August 2007 Review of Sales & Use Tax Systems

Trustfile has sales and use tax programs for CT, FL, GA, IL, LA, MD, NJ, PA, SC, TN and WI, providing complete compliance for all cities and special taxing districts within those states. The system includes electronic filing and remittances to supporting jurisdictions. The programs operate separately from each other, so businesses with reporting needs for more than one state would need to run each necessary state program independently. Each of the programs costs $149 per year, with support for up to five companies reporting sales taxes to that state. To support additional client companies, discounted bundle licenses are available for $99 with support for an additional five clients. Pricing includes downloadable tax rate updates or users can subscribe to receive CD-based updates. Free, full-use trials of the programs are available during the end of the year, enabling businesses to use the software for real filings during evaluation.

Navigation & Data Entry — 4.5 Stars
As previously mentioned, each of the states has a separate program. However, all of the programs share a consistent interface that opens to a clean presentation that offers large icons for primary functions, including selecting or adding companies, report functions, entering data, print options and the Help utility. Trustfile's client list displays companies in a spreadsheet-like table that allows sorting and selection, as well as the creation of new companies. The primary functions of the program are available after selecting a company and choosing a period ending date from a pull-down menu that includes an interactive calendar function. This function serves two purposes: First, it can be used to look up previous filings; and second, if a filing does not yet exist for the ending date selected, the system prompts the user to create the report/tax filing.

During data entry, the interface uses a split screen to show a digital version

motor fuel gasoline, motor fuel diesel, and motor fuel other), and 17 exemption categories. Trustfile can also import sales information from Peachtree, Excel and ASCII formats.

Overall, Trustfile is a very easy-to-use system that prompts the user to perform tasks as needed, including data-entry functions, electronic filing or printing, and remittance of collected sales taxes to the appropriate government entity. :::::;

Filing, Electronic Compliance & Payment — 5 Stars
One of the core benefits of Trustfile is in its support for electronic filing and remittance of tax funds to all of the states that support it, while also allowing users to print traditional forms or mail remittances if they prefer. During the electronic process, acknowledgements, validations and receipts help ensure the proper processing of returns and funds, while a system log tracks all transmissions. Reports are saved within the system and can be easily retrieved based on period ending date or can be printed or output into PDF format.

Rate Updates — 4.5 Stars
Trustfile provides users of its software with free tax rate updates that can be downloaded from the company's website. An optional CD-based rate update subscription is also available. The system can be set to automatically check for tax table updates at startup.

Help/Training — 3.5 Stars
The Trustfile system includes a traditional built-in Help utility with a user's guide and links to the company's support website, which offers program updates, a knowledgebase of FAQs, recent news and additional downloads. A printed version of the user's manual is an additional $25. Phone and web-based

support is included in pricing, with Premium Support available for $100, which

to their clients.

2007 Overall Rating: 4.5 Stars

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