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PRODUCT & SERVICE GUIDE

2016 Review of Avalara TrustFile

TrustFile from Avalara, is an ideal fit for small businesses and e-commerce merchants looking for an automated way to process, fill, and file tax forms for all 50 states. TrustFile works closely with AvaTax to calculate accurate sales and use tax ...

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[From the 2016 Reviews of Sales Tax Systems.](#)

Product Strengths:

- Product is extremely easy to use, and offers fast form processing
- The product is affordably priced for even the smallest business or e-commerce merchant
- Users can choose to e-file returns, and even pay tax liability electronically is available through the state
- Product offers users a report that outlines whether the correct tax has been collected to-date

Potential Liabilities

- More functionality is available if used with AvaTax for calculating tax liability accurately

Best Fit: TrustFile from Avalara, is an ideal fit for small businesses and e-commerce merchants looking for an automated way to process, fill, and file tax forms for all 50 states. TrustFile works closely with AvaTax to calculate accurate sales and use tax for all transactions processed by the small business owner.

Basic System Functions: 5 Stars

Avalara TrustFile is designed for small businesses and e-commerce merchants, TrustFile automatically integrates with popular e-commerce platforms such as Amazon, eBay, FreshBooks, Etsy, Lemonstand, PayPal, QuickBooks, Shopify, and Xero, along with others. Trust File can be set up in three easy steps, and quickly synched to the platform of choice, ensuring that all transactions are immediately available in the product.

Each state that has sales is listed on the TrustFile Dashboard, with a drop down menu, where users can chose the appropriate forms to file for each state. TrustFile processed forms quickly and user navigation is simple, even for new users. TrustFile will automatically sync with popular online selling platforms, but if small businesses aren't currently selling online, they can simply export sales data as a CSV file directly into TrustFile. Once the files are uploaded, the product will automatically map the information in order to determine the total amount of sales tax that has been collected to date. TrustFile can also provide a summary of accrued taxes that will be due during the next tax filing period.

E-Commerce and Automation: 4.75 Stars

The easily navigated user dashboard provides a quick summary of all taxes collected to date as well as state by state totals for any state where tax is currently due. Users can simply click on a state to view the Review and File screen, which details the state and tax type, the month that the tax is due, the net tax uploaded, and the pre-adjusted tax due.

The system will also notify users about what tax form is needed in order to complete the filing, and will also display additional information such as whether the state or jurisdiction allows online filing and payment. If online filing is available, users can simply use TrustFile's One-Click Filing, access the state or jurisdictional website, or download and mail the completed form. If users choose to file forms online, the Filing Status function will display, providing users with due dates, date filed, and when the form is accepted.

Reporting Tools: 4.5 Stars

In addition, all forms can be downloaded as a PDF file and saved for future access. Users can choose to add a bank account for quick online payment of any taxes dues,

and send payments electronically for any state or jurisdiction that accepts electronic payments.

The Business Summary, in the upper right hand corner of the screen, provides users with a quick look at all current tax liability being processed.

The transaction list provides a listing off all system transactions, and is similar to the list found in AvaTax, where users can easily edit transactions by simply clicking on the appropriate transaction and entering updated information.

Integration Tools: 4.5 Stars

TrustFile also provides users with historic tax liability data, and the Collection Review feature is especially helpful for new business owners as it provides a mechanism where they can review current tax collection data and determine if the correct taxes are currently being collected from customers. Reporting options in TrustFile provide users with details on all taxes collected, including where forms need to be filed, as well as the corresponding due dates for each of the forms.

Support: 4.75 Stars

Especially useful for the newer business owner or online merchant, TrustFile provides these entities with a lighting quick way to process tax forms and remit tax payments. New uses can get started for free, with TrustFile offering a free 30-day trial. After the trial, pricing is \$24.00 per month for unlimited transactions. For business owners looking for tax calculations, AvaTax (reviewed separately) works with all billing and e-commerce platforms to automate tax calculations for all 50 states.

Avalara offers a tremendous amount of resources, tools, and help options for new product users, including access to the new Forum, where users can communicate with other users, access FAQ's, and get product assistance if needed.

2016 Overall Rating: 4.75 Stars

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