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REVIEWS

2019 Review of Avalara AvaTax

Mary Girsch-Bock • Nov. 18, 2019



Avalara AvaTax

www.avalara.com

From the 2019 reviews of sales tax compliance systems.

Avalara AvaTax is a cloud-based sales tax calculator that is designed to integrate with numerous business and retail applications to provide automatic tax rate lookup and calculations. AvaTax is a good fit for businesses and retailers of any size as well as accounting professionals that currently handle sales tax calculations for their clients.

AvaTax currently offers prebuilt integration with more than 700 ERP, ecommerce, point of sale, CRM, and accounting applications, and also offers an advanced API. AvaTax currently supports calculations in more than 12,000 sales and use tax jurisdictions in the U.S. and beyond.

AvaTax uses an advanced tax calculator that helps businesses and accounting professionals ensure that all tax rates and calculations are accurate. The product also helps businesses apply the correct type of tax to each type of product that is sold. AvaTax, like all Avalara applications, is designed to be used as a stand-alone application, but offers easy integration with other Avalara applications such as Avalara Returns and Avalara Licensing.

AvaTax is designed to work behind the scenes, integrating with numerous applications to offer complete tax calculation. The application also offers complete address verification, checking all addresses that are entered into the application for accuracy and authenticity. Geolocation is also used to ensure that the correct tax rate is calculated and applied to all sales transactions based on where the sales transaction takes place. AvaTax users can also manually import transactions from third-party applications directly into AvaTax using Microsoft Excel or a CSV file.

AvaTax performs on-demand calculations by delivering real-time tax rates and calculations at the time of sale. To further extend product functionality, AvaTax can be used in conjunction with Avalara Returns to prepare and file sales tax returns, with an option to remit payments offered as well. Returns can also be printed and filed by mail if desired. Avalara constantly updates tax rates, including access to the latest jurisdictions and tax holiday information, so users can be assured that the correct tax rate will be calculated. Along with U.S. tax jurisdictions, AvaTax also includes complete VAT calculation for more than 190 countries while also supporting consumer use tax. Complete exemption certificate management capability is available in AvaTax using the optional CertCapture, with users able to upload and manage all certificate images. Those using AvaTax can also provide their customers with access to CertExpress, which allows the customers to create exemption certificates.

Avalara support personnel work with all customers to properly set up the application, with users able to make any future changes using the Admin Console. Account alerts, a tax summary and direct access to the Avalara Help Center is also available from the Admin Console.

AvaTax includes a good selection of reports, including a Document Summary report which displays totals for all documents entered into AvaTax. The Tax Summary report displays tax liability of a country or region, and the Tax Jurisdiction Detail report shows transactions by state, county, city, and special tax jurisdiction while the Exemption report displays exempt customers and corresponding transactions. All reports created in AvaTax can be viewed on screen, printed, or exported in a variety of formats including Microsoft Word and Excel, RTF, Crystal Reports, or saved as a PDF.

The Avalara Help Center contains a completely searchable knowledgebase, as well as trending topics and FAQs. Users can also access Avalara University directly from the Help Center, which offers a variety of videos and workshops. Avalara Guides are also available in a variety of topics including Updates, Returns, CertCapture, TrustFile, Avalara for Communications, and Excise. Users can visit the Avalara website to access help and support resources, or access support from the Admin Console. Avalara offers toll-free product support during extended business hours, with support available via a toll-free line. Email and chat support options are also available as well.

Avalara AvaTax is well suited for retail businesses of any size that wish to truly automate sales tax calculation. The product, when used in conjunction with Avalara Returns, can also prepare and file returns and remit payment. For those that need to better manage exemption certificates, the optional CertCapture application can ensure that customers are taxed or not taxed appropriately. AvaTax is available as a subscription with pricing available upon request from Avalara. Avalara also offers a special program for accounting professionals that manage sales tax for clients, which includes Avalara Licensing, Avalara AvaTax, TrustFile for Accountants, and Avalara CertCapture, with the ability to sign up as an Avalara Partner.

2019 Overall Rating: 5 Stars

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