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REVIEWS

2019 Review of Avalara TrustFile

Mary Girsch-Bock • Nov. 18, 2019



Avalara TrustFile

Avalara

www.trustfile.avalara.com

From the 2019 reviews of sales tax compliance systems.

Designed for ecommerce sellers, Avalara TrustFile helps automate the sales tax preparation process, and can be used in all 45 states that currently impose sales tax. TrustFile syncs with popular online selling platforms to reduce the amount of data entry needed in order to complete accurate, ready-to-file sales tax returns. TrustFile does not provide tax calculations, so if calculation is necessary, users should consider using Avalara AvaTax, which can provide accurate sales tax calculations for all U.S. taxing jurisdictions.

TrustFile is currently available in two editions: Standard, which is ideal for smaller businesses that only do business in a few states, and Premium, which is ideal for those that have to file in multiple states.

TrustFile uses a dashboard for managing all returns, states, transactions, and data sources. Users can get started by clicking on one of the connectors at the bottom of the screen. There is an option to sync transactions from a specific start date, and if there is no connector listed, users can simply upload a CSV file into TrustFile. Once a connector has been used, it will sync with TrustFile to automatically import transactions. Users can also opt to enter information into TrustFile manually, which may be a good choice for smaller businesses with limited transactions.

Users can access the States and History option to enter and manage all states where sales tax needs to be paid, with a complete filing history displayed for each state. In order to start using TrustFile, users will need to be registered with the appropriate states. It's important that all sales tax information has been synced prior to setting up the states that require sales tax collection and remittance.

TrustFile supports online filing where permitted by the state, allowing users to e-file returns, though there is also an option to download any completed forms and file by mail if desired. In addition to e-filing returns, users can opt to remit payment electronically by entering remittance information in TrustFile. The banking information used will then be forwarded to the appropriate states where tax is owed, with the state withdrawing the funds at a specified time. Once automated remittances start, users will be able to visit the Payment and Remittance option to view all payments made. The Current Returns option allows users to view all taxes collected, as well as view any state forms that will need to be filed.

Users can easily review their returns prior to filing, having the option to correct any error and alerts that may have popped up. After confirming alerts, users will need to confirm the amount listed in the return, then click the File Now button to submit the return electronically.

TrustFile is a good resource for marketplace and online sellers, syncing with popular selling platforms such as Amazon, Shopify, 3dcart, WooCommerce, X-Cart, BigCommerce, eBay, and Etsy. The product also offers integration with QuickBooks, Xero, Sage, Microsoft Dynamics, Stripe, and PayPal. TrustFile uses a connector to sync the application, which eliminates the need to enter sales data manually. Those not using online selling systems can import their sales transactions directly into TrustFile using a CSV file.

The Avalara Help Center is designed for all Avalara product users, offering a variety of updates for various applications. Along with solid help options, Avalara University offers a variety of training options for product users. A series of product guides can also be accessed from the Avalara website including guides for various product connector platforms that are used in Avalara to connect the application to third-party accounting software and e-Commerce platforms. System setup guides are also available as are guides on importing transactions from other applications. Toll-free support is available during regular business hours, with email and chat support options offered as well, with an option to submit a support request directly from the Avalara website if desired.

Avalara TrustFile is best suited for small to mid-sized retail businesses and specialty shops that wish to automate tax form preparation and filing. A free demo is available to download for those interested in trying out the application prior to purchasing. Mentioned earlier, TrustFile is available in two editions: Standard, which runs \$240 annually, with an \$18 fee assessed for each return filed, and Premium, which works best for businesses that sell products in a variety of states, and includes one return filing per state, per month.

2019 Overall Rating: 4.75 Stars

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