Avalara
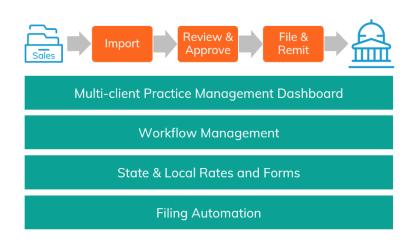
Avalara Returns for Accountants

Extend your practice with sales tax preparation and filing services

With new economic nexus rules coming on top of already complex state and local filing requirements, your clients are challenged to maintain sales tax compliance. They want your help, but in order to grow your preparation and filing practice, you need to be able to deliver these services profitably.

Avalara Returns for Accountants provides the cloud-based tools, tax content, and support required to scale your practice more efficiently. Grow your business with the same sales tax technology Avalara uses to file millions of returns each year.

Returns for Accountants is **designed for accounting firms.** It delivers visibility into process status, manages multiple clients more efficiently, and automates filing based on the needs of accounting firms. Accountants can now better serve their clients, scale for firm growth, and reduce compliance risk for themselves and their clients.

Sales → Import → Review & Approve → File & Remit → 🏛️

Multi-client Practice Management Dashboard

Workflow Management

State & Local Rates and Forms

Filing Automation

Enable business scalability

- Enable growing your client base with less staff
- Minimize manual entry of returns to jurisdiction websites
- View a single status dashboard for all clients, preparers, and returns

Drive efficiency

- Manage multiple clients and staff assignments for maximum productivity
- Use Avalara filing automation for efficient electronic filing in many jurisdictions
- Enable staff to focus on more profitable advisory services

Reduce firm and client risk

- Access built-in rates and forms for the U.S. & Canada
- Enable jurisdiction direct debit of tax from client accounts, eliminating funds management
- Utilize the same proven technology used by Avalara

Improve client satisfaction

- Relieve your clients of burdensome preparation and filing tasks
- Edit tax forms directly to handle special situations or more demanding clients
- Deliver professional work products to clients
- Reduce client audit risk and exposure

Workflow management

Returns for Accountants tracks and manages each return as it makes its way through the preparation and filing workflow, enabling more efficient management of many preparers and client returns. Full control is provided over users, roles, tasks, and client assignments.

- **Omni-channel Data Import:** Returns for Accountants provides robust data import functions to more easily assimilate client sales information from multiple channels and marketplaces.

- **Client Customization:** Firm-level defaults and client-specific overrides facilitate custom handling, such as balancing, rounding tolerances, and filing methods. Preparers have the flexibility to make adjustments directly in the return form with a complete audit trail of changes.

- **Liability Worksheet:** A consolidated view of client liabilities enables reconciliation, review, and approval across all jurisdictions, including state, city, and county.

- **Practice Management Dashboard:** Dashboard views enable easy tracking of filing status across all preparers, clients, and returns. A multi-level review and approval process ensures both firm and client get the chance to review prior to filing. Client notices can be tracked and worked through to resolution.

- **Record Retention:** Copies of liability worksheets, preparer notes, sales tax returns, and payment and filing confirmations are available to provide to your client for audit or record retention.

Filing automation

When it's time to file, Returns for Accountants gives you the flexibility and control to meet the needs of your most demanding clients more efficiently, while ensuring data security and client confidentiality.

- **Security:** Confidential client DOR log-in credentials and banking information are kept secure within the client's filing calendar and validated prior to filing.

- **Returns Automation:** Several options are available to optimize filing efficiency and support jurisdiction-specific filing methods. When available, direct electronic methods are used to fully automate the filing process and capture jurisdiction acknowledgements. EDI files can also be generated for manual upload to the DOR website. Alternatively, preparers can generate PDF returns to facilitate client reviews and web filing. Client signature images are affixed to returns and ready for printing and mailing by the firm if needed.

- **Remittance:** Jurisdictions debit tax remittances directly from client or firm designated bank accounts. This simplifies payment for the client without putting your firm in the funds flow, if not desired.

Who is Avalara?

We're a team of tax experts and technologists behind one solution for your accounting firm. We live and breathe sales tax and license compliance. We help firms confidently and efficiently provide compliance services to their clients.

From independent operators to midsize businesses and Fortune 100 companies, more than 30,000 customers choose Avalara for tax compliance tools scaled to their needs. You'll find Avalara all around the world helping businesses prepare for growth in the global market.

Avalara
Tax compliance done right

Learn more at avalara.com

Contact us for a demo and consultation.