

HERE'S HOW TO

Generate a Report of Non-Returning Clients

Using the Desktop Software Program, this document will guide you through exporting a list of non-returning clients to a CSV (Comma Separated Value) file, which can be opened with any spreadsheet program (e.g. Excel). Use this report to follow-up with non-returning clients and schedule appointments, file extensions, etc.

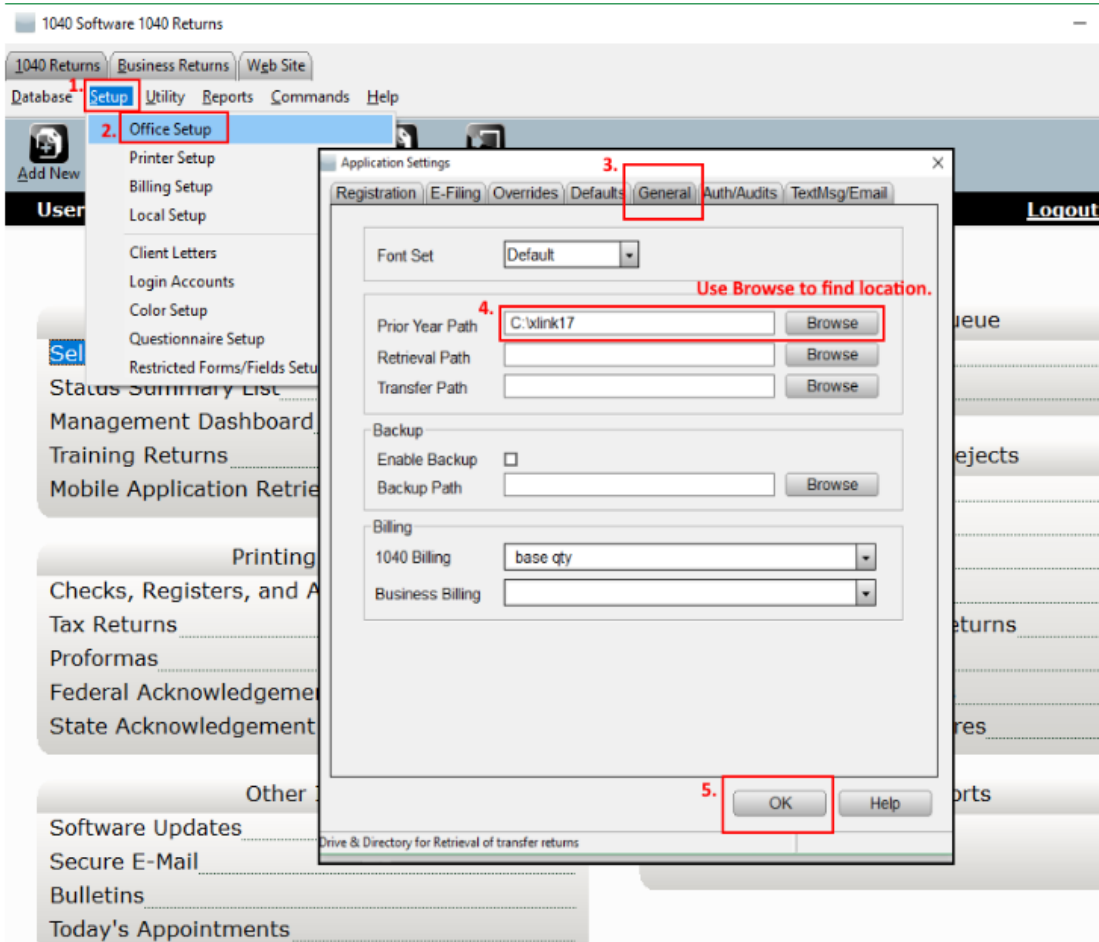
If you have additional questions about these instructions, please contact our **Partner Support Team** at **206-209-2653**. You can also email us at help@erosupport.com.

Contents of Report: The report contains the following information

EFIN	Home (Home telephone number)
OWNR (return owner)	Work (Work telephone number)
PSSN (Primary taxpayer SSN)	EMAL (Primary taxpayers email address)
PNMA (Primary taxpayer first name)	SSSN (Spouse SSN)
PNMB (Primary taxpayer middle initial)	SNMA (Spouse first name)
PNMC (Primary taxpayer lastname)	SNMB (Spouse middle initial)
COAD (Care of Name)	SNMC (Spouse lastname)
ADDR (Address)	CPHN (Cell phone number)
CITY	DATE (Date the prior year return was created)
STAE (State)	
ZIPC (Zip code)	

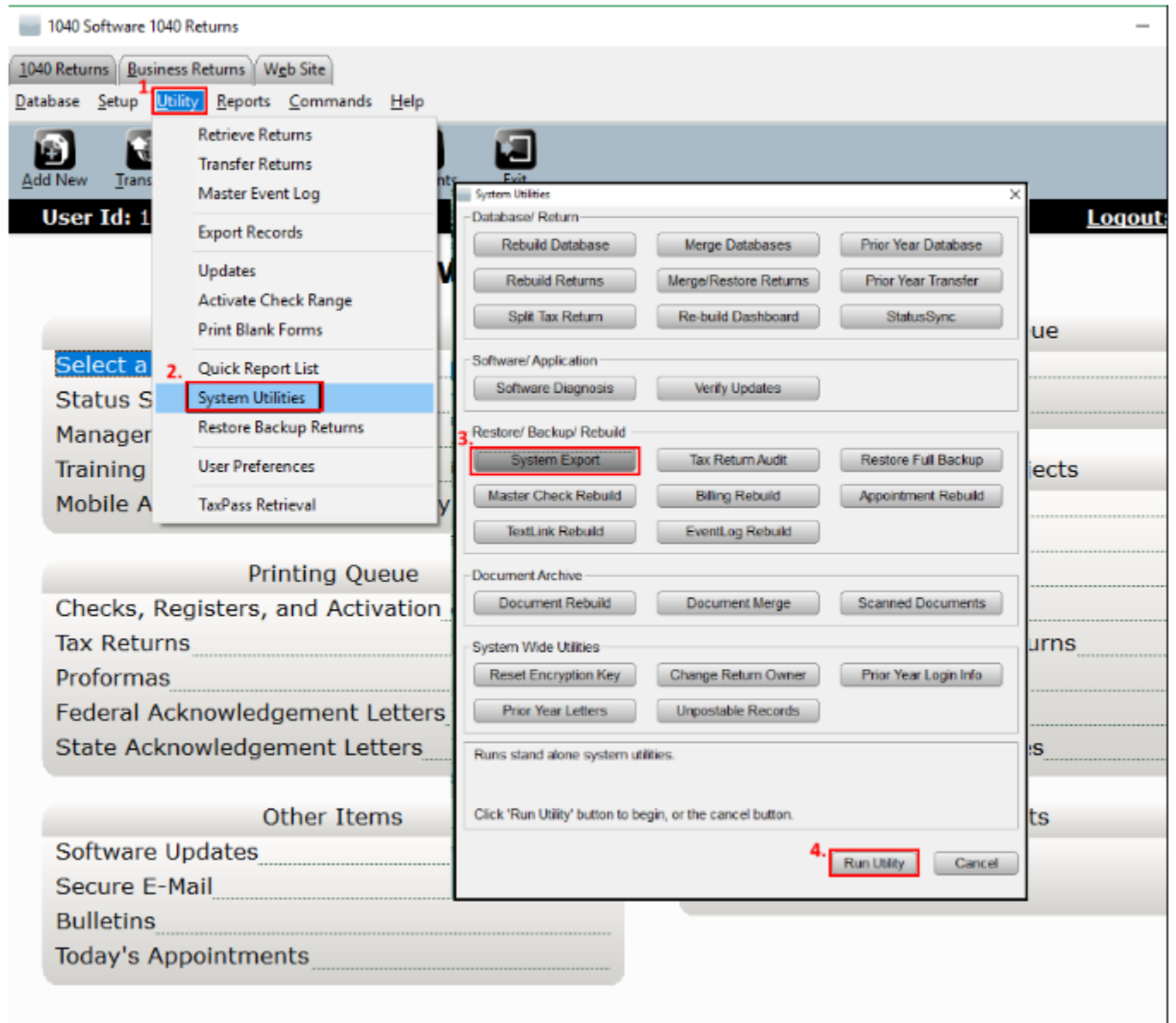
Confirm the *Prior Year Path* is entered.

1. From Setup
2. Select **Office Setup**
3. Then the **General** Tab
4. Confirm location by using the **Browse** button
5. Click **OK**.



Running the Report

1. Navigate to **Utility**
2. Select **System Utilities**
3. Next Select the **System Export Button**
4. Then click on **Run Utility** to open the "External Utilities" window.



Saving Report to Location

1. Select **List of Non-Returning Clients**
2. Use the **Browse Button** to determine the Location and Name of file
3. Click **Run**.

