

October 17, 2006

Issue 2006.12

## **ExacNews**

### **ExacTax Client:**

The final deadline for most returns has now passed and the entire staff at ExacTax would like to thank you for a very successful season. This marks our 18<sup>th</sup> year in business and we look forward to serving you for many more years.

There was some uncertainty with the change in extension dates this year about how much last minute volume would increase. However, our extra support days and additional staffing during the final two weeks helped us keep the in-house turn around to 48 hours or less in most cases.

### **Electronic Filing**

All deadlines for original e-file returns have now passed. Returns that were e-filed timely but were rejected have until Friday, October 20th to make corrections and re-transmit. If corrections can't be made then the return must be filed on paper.

### **New Marketing Service**

Look for a mailing from ExacTax later this month announcing new marketing and client retention products to help you maintain and build your business.

### **Tax Organizers**

The Tax Organizer Order Form will be mailed out at the end of October. This will list all 1040 clients processed by October 27<sup>th</sup>. You may add and delete Organizer orders from the list. If the list is not returned by the deadline, ExacTax will print Tax Organizers based on the pre-orders as shown on the list. You will be billed for all Organizers printed and no credit will be available. Late requests for Tax Organizers will be processed in January, after the proforma has been printed.

**➔ Tax Organizers are not processed for accounts that have not renewed for tax year 2006. Be sure that you renew for 2006 before you send in your order.**

### **Labels**

A set of labels will be mailed in late November at no charge. The set will contain two labels for each 1040 client processed by October 27th.

### **Hold for Pick-Up**

If you plan to pick up a return that would normally be packed for shipping, please call before 3:30 PM and let our Shipping Department know so they can set aside your returns. This will make the pick-up process more efficient for everyone. As announced in December of last year, there is no additional charge for returns marked as "Hold for pick-up" at ExacTax. However, returns that were not initially marked as "Hold for pick-up" on Form PI and are subsequently picked-up will still be billed the shipping charge, if any, assigned to that return. ExacTax will start applying this policy beginning October 23rd.



**Billing Queries and Reminders**

When requesting adjustments to your billing, state the problem in the comment section of your remittance and include it with your payment. Any problems or questions regarding billing queries may also be faxed directly to the Accounting Department at 714-999-6566. Requests for credit must be made in writing.

**IMPORTANT:** *Accounts with an outstanding balance over 21 days will be placed on C.O.D. status. C.O.D. accounts will be shipped UPS C.O.D. until the account is current. → C.O.D. status will delay shipment of proforma and organizers!*

**Telephone Reruns and Supply Orders:** To process Telephone Reruns or order supplies, call 800-786-4272. The operating hours are the same as for Customer Support. When calling in a Telephone Rerun, please have all information ready, including the form number or form name, form section and box number for the changes. Always have your account number, the log number of the return and the needed changes ready for the Telephone Rerun Representative. In order to be processed and ready for shipment the following day, Telephone Reruns must be called in by 4:30 P.M.

**Important ExactTax Telephone Numbers**

Main numbers	714-284-4802	800-352-3638
<b>Customer Support</b>	<b>800-254-2244</b>	
Telephone Rerun	714-239-6139	800-786-4272
Electronic Filing	714-254-7213	
Main fax	714-284-4814	
Customer Support fax	714-254-7210	
Accounting fax	714-999-6566	

Street address: **2301 W Lincoln Ave #100**  
**Anaheim, CA 92801**

Or mail to: **P.O. Box 61048**  
**Anaheim, CA 92803-6148**

To contact us by e-mail, use the following addresses:

- Sales..... **exsales@exactax.com**
- Customer Support..... **exsupport@exactax.com**
- Electronic Filing..... **efrdeaut@exactax.com**
- Technical Support..... **extech@exactax.com**
- Administrative..... **exadmin@exactax.com**
- Accounting..... **exaccts@exactax.com**

**Also, visit our improved web site: <http://www.exactax.com>**