

November 1, 2006

Issue 2006.13

ExacNews

ExacTax Client:

The 2006 Tax Organizer order forms have been shipped. If you have any changes, return your order forms by **November 17th** to have any changes included in the first run. If you do not request any changes, organizers will be printed based on the pre-selections shown on your order form. You will be billed for all Organizers printed and no credit will be issued.

Tax Organizers will not be printed for non-renewed or C.O.D. accounts.

Labels

A complete set of client labels has been included with the Tax Organizer order package at no additional charge. The set contains two labels for each 1040 return processed by October 27th. Order additional sets using the form included with the labels.

Tax One-To-One

ExacTax is pleased to announce the introduction of a new marketing service called Tax One-To-One. The service specializes in the printing of marketing materials utilizing customized manipulation of targeted variable data to substantially improve the overall response rate. A sample of the initial products, a tax newsletter and a holiday card/calendar, has been sent to ExacTax clients who have processed 25 or more individual returns. This service is also available for any user-defined marketing project.

Amending 2004 and 2005 Returns

When re-running a 2004 or 2005 1040 return to amend it, you need to request a check in Box 2 on Form *Amend* [95A] and all of the information from the previous return will be recalled. Enter the amended explanation and other changes to the return as you normally would. To amend a state return, request a check on that state's amended form in the box labeled '*Transfer original information*'. For example, to amend a California return check zip box 1 on Form CAAmend [CA35].

To amend returns not previously processed through ExacTax, you must complete all of the applicable fields on Form *Amend*. Then complete the other input forms, as needed, to produce the new corrected return. If there are more than 30 changes in all, you must make all changes on the input forms, including the amended forms, and resubmit them for processing as an initial return.

Hold for Pick-Up

If you plan to pick up a return that would otherwise 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. This policy became effective beginning October 23rd, 2006.

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 ExacTax Telephone Numbers

Main numbers	714-284-4802	800-352-3638
Customer Support	800-254-2244	
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>