

ezytax
BLUE

client
tracker



- Once you have entered all clients for the respective month as above you must then search for each client via the Portal – If you can find the client then use the **LODGMENTS** drop-down and enter the **INCOME TAX** (the income tax is a second check).

Australian Government
Australian Taxation Office

TFN, ABN, WPN, EIN or name × Q

View client list Advanced search

My practice Reports and forms Communication

MCCUTCHEON, KERRY TFN 488 293 768 Add to favourites

Summary Profile Accounts and payments **Lodgments** Super Business

For action

- ✓ Lodgments are up to date.
- ✓ Payments are up to date.

Activity statements
Income tax
Non-lodgment advice
Taxable payments annual report
Client reports
Client forms

- If they are still on our Portal and have lodged their most recent ITR then label them in the RCT document accordingly.

Summary Profile Accounts and payments **Lodgments** Super Business

Income tax

Not lodged History

No tax returns are due at this time.

A	B	C	DEF
CLIENT NAME	LODGED 2015	CLIENT ON PORTAL	
MORRISON, Joy	Y	Y	11

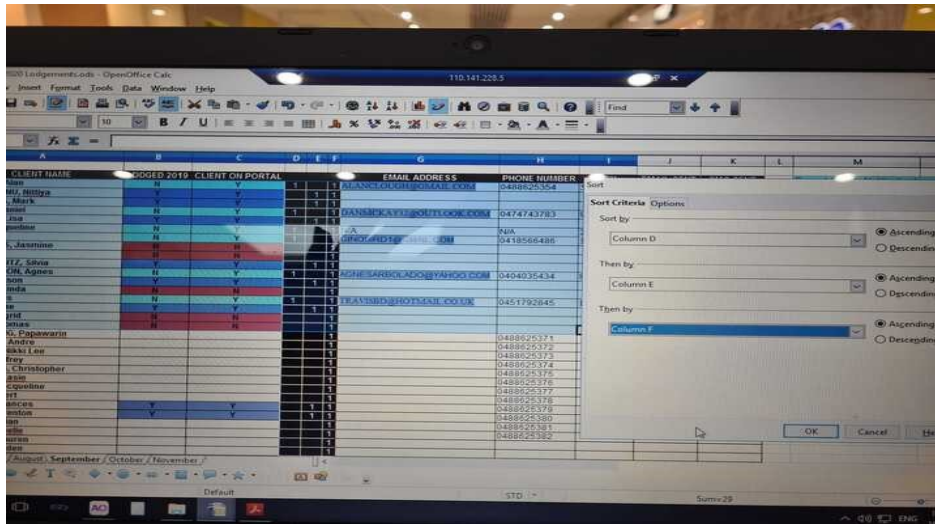
- If you cannot find a client on the Portal, check to see if they are on MYOB and search using their TFN. If still not coming up or “no access” fill column B and C in RCT with **RED (NN)**.

If they are on Portal but have not lodged their most recent return, mark them as **LIGHT BLUE (N Y)**.

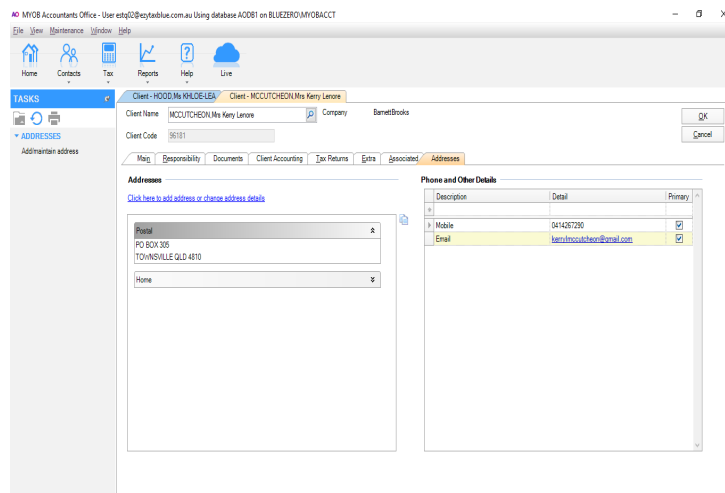
If they are both on Portal AND lodged then mark as (**Y Y**) and **DARK BLUE**.

LODGED 2020		CLIENT ON PORTAL				
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
N	Y	1		1		
Y	Y			1		1
Y	Y			1		1
Y	Y			1		1
Y	Y			1		1
Y	Y			1		1
Y	Y			1		1
Y	Y			1		1
Y	Y			1		1
Y	Y			1		1
Y	Y			1		1
N	N					1
N	N					1

- To sort clients by colour, highlight the client name and go to **DATA > Sort > enter D, E and F**. This will group all the clients together making it easier to put into SMS ready spreadsheet later.



- Once you have marked all of the entries as above, begin entering their contact info. Search for each **LIGHT BLUE** client and copy their **EMAIL, MOBILE NO.** and their **TAX FILE NUMBER**. This can be done via MYOB, Client Details on ATO or by searching for their CIF that was scanned and uploaded in previous years.



- Once the above step is completed and all **LIGHT BLUE (NY)** have had their contact information imported, it is time to prepare the SMS lists. Unlike the RCT trackers, SMS lists are not broken down by month, only by location and year. The SMS ready templates can be found at: Ezytax(T:) / Location **Eg. Cairns / Administration / Client Management / Template RCT**

At this stage, all of the clients that will receive ;marketing materials i.e. **LIGHT BLUE (NY)** should be completed and sorted as seen below. Simply copy and paste all clients

along with their contact info into the SMS ready list making sure to include all clients from that location – check all sheets on the RCT document.

	A	B	C	D	E	F	G	H	I	J	K
1											
2	CLIENT NAME	LODGED 2019	CLIENT ON PORTAL				EMAIL ADDRESS	PHONE NUMBER	TFN	EMAIL SENT	SMS SENT
3	AH-WONG, Solomon	N	Y	1	1	N/A		0482556305	N/A		
4	AKUILA, Samuela	N	Y	1	1	SAMAKUILA2011@GMAIL.COM		0477504694	352 741 102		
5	ARIEL, Asher	N	Y	1	1	ASHER_ARIEL@GMAIL.COM		0432570195	187 354 331		
6	BALL, Anna	N	Y	1	1	PSYCHO_CHICKEN84@HOTMAIL.COM		0420715058	402 614 245		
7	BERI, Vikas	N	Y	1	1	N/A		0488750848	329 417 668		
8	CAREY, Brodie	N	Y	1	1	BJCAREY711@GMAIL.COM		0424047117	773 807 088		
9	CRIDGE, Ashlee	N	Y	1	1	a_cridge@outlook.com		0455470805	981 131 828		
10	CURRAN, Mark	N	Y	1	1	markcurran080@gmail.com		0421962112	313 815 957		
11	ERIKSSON, Gregory	N	Y	1	1	N/A		0458721285	127 832 476		
12	FLOOD, Sharyn	N	Y	1	1	sflood@y7mail.com		0412777010	587701884		
13	FLOOD, Thomas	N	Y	1	1	tflood53@yahoo.com		0415505882	562354606		
14	HEYSTRATEN, Peter	N	Y	1	1	PETERHEYSTRATEN@YAHOO.COM		N/A	451 171 295		
15	KRUGER, Brooke	N	Y	1	1	N/A		0437062549	872705286		
16	REUBEN, Jennifer	N	Y	1	1	JENNIFERAREUBEN@GMAIL.COM		0439002052	547 584 877		
17	RUSSELL, Taleithya	N	Y	1	1	BOBF@BOBFITZ.COM.AU		0439283600	504 585 662		
18	THOMSON, Anne	N	Y	1	1	THOMSONANNE@HOTMAIL.COM		0405122645	118 707 928		
19	TOLLAN, Jaclyne	N	Y	1	1	JAMEROOS@HOTMAIL.COM		0476023039	510 026 237		
20	TRAINOR, John	N	Y	1	1	lambogod97@hotmail.com		0438070070	340237379		
21	TURNER, Glen	N	Y	1	1	GLENNTURNER1961@GMAIL.COM		0457584736	672 588 109		
22	WOOD, Zac	N	Y	1	1	ZNWOOD1@GMAIL.COM		0439820141	824 862 932		