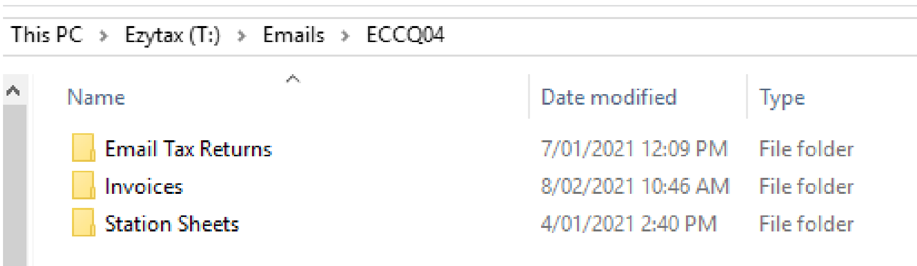
ezytax BLUE

email client manual

EMAIL CLIENTS

When completing tax returns for Email clients there are several important aspects to consider:

- Try to be as efficient as possible when communicating to reduce the amount of back and fourth required as possible
- Keep good records of progress made to ensure all members of staff can work with the same client at different times
- Ensure payment is received from the client and is recorded correctly (Station Sheet, Invoice etc)
- Use the Email templates provided
- All emails **MUST** be replied to within 30 minutes of receiving
- Email folder can be found at Ezytax(T:) > Emails > ECCQ04



EMAIL ACCOUNTS

As Ezytax currently has several active Email accounts it is important to identify which account a client has emailed. Depending which account has been used will determine the base price for the tax return, which Station Sheet & Invoice Number to use and which Price List to attach to the first Email template sent to the client. We want to reduce the amount of time required to complete the return and make the process as easy as possible for the client. We can do this by ensuring all information required is requested in one go and make sure we are not asking for the same thing multiple times:

Cairns Ezytax email (cairns@) – Blue Pricing

Ezytax Blue (ezytaxblue@, taxreturns@) – Blue Pricing

BlueTax Online – Blue Tax Pricing

VA Tax Accountants – VA Pricing

FK Tax – FK Pricing

EMAIL TEMPLATES

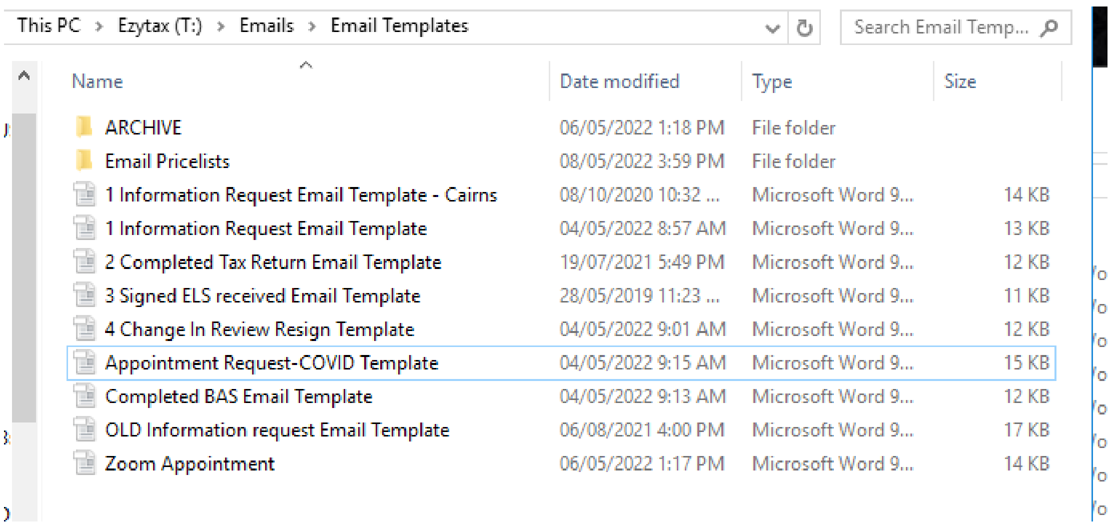
When an Email comes through from a client asking to complete a return simply use the appropriate Email template to ask for all the information required to complete the tax return and provide the client with payment options. **MAKE SURE TO READ THE EMAIL THROUGHLY TO ENSURE THERE ARE NO MISTAKES.** Sometimes the template may need to be amended if the client has already provided some information, eg has already sent their PAYG in the initial Email, or may require further information, eg, they have mentioned they have a rental property. In these cases simply amend the template as required and send to the client.

Once the client has sent all the required information **AND PAYMENT HAS BEEN RECEIVED** then the tax return can be completed. As soon as the return has been processed a copy of the return including the ELS and a Sub Dec can be sent to the client using **ADOBESIGN**. This will ask for the client to sign the ELS and Sub Dec and send back. **REMEMBER TO ATTACH ALL DOCUMENTS TO BE SIGNED.**

Once the signed documents are received there is a final Email email template thanking the client and informs them that the process is complete.

Email Templates are found at Ezytax(T:) > Emails > Email Templates.

Remember, you can adjust where necessary.



<u>JIRA</u>

It is very important when working with Email Clients to ensure you are always updating JIRA (see JIRA manual for more information). By adding jobs to JIRA it helps prevent mistakes and allows all members of staff to continue to work though client emails with the same client.

AS SOON AS A CLIENT SENDS AN EMAIL ASKING TO COMPLETE A TAX RETURN A REPLY ASKING FOR THE REQUIRED INFORMATION SHOULD BE SENT AND THE CLIENT SHOULD BE ADDED TO JIRA.

Once the client has been added to JIRA, anytime there is contact with the client, eg asking for information & payment or sending the tax return to sign or payment is received, ensure JIRA is updated with the relevant information. This will ensure any member of staff can continue to work with the client to get their tax return completed as efficiently as possible and will reduce confusion and mistakes.

PAYMENT METHODS

There are two payment methods for Email Clients:

1. PayPal
2. Direct Transfer

Once the client has sent the information needed to complete their tax return (in response to Email Template 1) we will know what income they have to declare and how much to charge for the tax return. All clients will be issued a PayPal invoice at this stage. When created, the PayPal invoice will have an auto generated invoice number which needs to be recorded on the following Station Sheets:

- Ezytax – ECCQ04 Station Sheet
- VA – VCCQ02 Station Sheet
- Bluetax – BTO Station Sheet
- FK Tax – FK Station Sheet

If the client wishes to pay via direct transfer, they can find our bank details on the PayPal invoice in the Notes section. As soon as the money is confirmed in Ezytax's account then the invoice number created for the PayPal invoice can be recorded as PAID and the Station Sheet and JIRA can be updated accordingly.

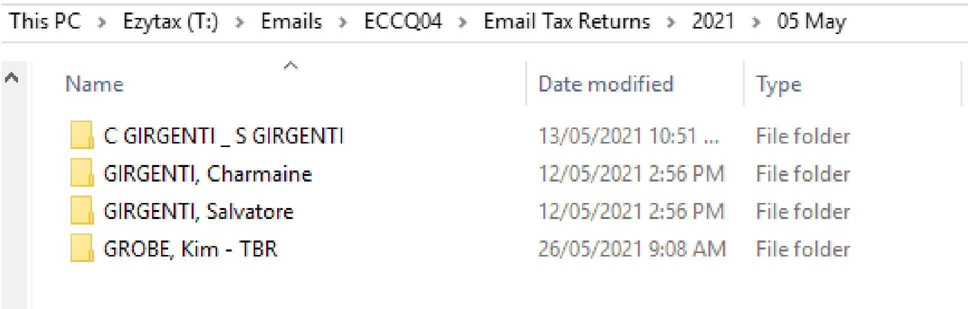
When added to the Station Sheet, the return will be considered outstanding (as it will not yet have been completed and signed etc) so the Station Sheet needs to be noted accordingly as "Outstanding or O/S". **Also do not forget to update the JIRA with Invoice Number information and Payment information at the same time.**

EZYTAX BLUE										
CAIRNS – STATION 4 (ECCQ04)										
DATE:	26/05/21									
CLIENT NAME	INVOICE #	INITIAL	WORK	PAYMENT TYPE	DATE PAID	AMOUNT	STATUS	REVIEW	DATE LODGED	ADDITIONAL NOTES (If status is 'Outstanding' give detailed explanation of what is still required)
Whitelight Film Pty Ltd/Tony Gordon	#ECCQ400212		2020 PAYG Payment Summ	PP		$220.00	O/S			awaiting payment

CLIENT FILES

When dealing with an Email client it is important all documentation is saved on our server for review and if required at a later date. As soon as a client emails information to process a return a Client File for them needs to be created at the following location on the server. The client file name should be in the format LASTNAME, Firstname.

Ezytax (T:) / Emails / ECCQ04 / Email Tax Returns / **Year** / **Month** / (new folder) **LASTNAME, Firstname**.



Ezytax (T:) / Emails / **BlueTax** / Email ITRs / **Year** / **Month** / (new folder) **LASTNAME, Firstname**.

Via the BO Server -

VA Drive (G:) / My Drive / **VA Tax Accountants** / Emails / VCCQ02 Email Tax Returns / **Year** / **Month** / (new folder) **LASTNAME, Firstname**.

VA Drive (G:) / Emails / **FKTax** / Email ITRs / **Year** / **Month** / (new folder) **LASTNAME, Firstname**.

Every client file should contain the following:

- copies of emails with all relevant information required to complete the return
- Payment Summaries
- Prefil from Portal
- Signed ELS and Sub Dec (once returned by the client).

SIGNED ELS

Once the information and payment has all been received from the client, the tax return has been processed and sent to the client and then returned signed, it needs to be reviewed and lodged. To ensure the tax return gets reviewed and lodged the same process is followed as with tax returns completed at the Booths. Firstly update the Station Sheet entry that would have been previously created when the client was invoiced (change from 'outstanding' to 'to be reviewed'), then add on the current day's Station Sheet in the Completed Outstanding Section, and finally change the folder name for the client to :

- Ezytax (T:) / Emails / ECCQ4 / Email Tax Returns / *Year* / *Month* / LASTNAME, Firstname - TO BE REVIEWED.

Finally, after the tax return has been reviewed and lodged, as with all tax returns, the relevant Station Sheet needs to be updated with the new Status as “Lodged” and the lodgement date entered. Also the “Signed ITR” folder needs to be renamed to “LODGED”.

Name	Date modified	Type
AL SHEKAILI, Khalid - Reviewed	10/02/2021 9:45 AM	File folder
BURFIELD, Anita - LODGED	19/02/2021 9:07 AM	File folder
BUSBY, Benjamin - Reviewed	15/02/2021 9:15 AM	File folder
CROFT, Reweti - TBR	19/02/2021 9:11 AM	File folder
DAVENPORT, Melissa - LODGED	11/02/2021 9:06 AM	File folder
DESAI, Amitkumar - Reviewed	11/02/2021 9:06 AM	File folder
FAVALE, Beatris - TBR	12/02/2021 11:52 ...	File folder
FISHER, Erlinda - Reviewed	24/02/2021 9:03 AM	File folder
HARLOW, Paige - TBR	17/02/2021 11:28 ...	File folder
JAMES, Amanda - Reviewed	26/03/2021 11:37 ...	File folder
LING, Fiona - LODGED	17/02/2021 9:17 AM	File folder
PARR, John - LODGED	5/03/2021 9:06 AM	File folder
PEDWELL, Marissa - LODGED	15/02/2021 9:12 AM	File folder
PRENTICE, Lochlan - LODGED	24/02/2021 9:04 AM	File folder
TAN, Sher - TBR	26/02/2021 10:57 ...	File folder
WALSH, Kurtis - TBR	26/02/2021 10:21 ...	File folder

****THE PROCESS FOR EMAILS IS THE SAME FOR ALL EMAIL CLIENTS FOR EZYTAX, VA TAX ACCOUNTANTS, FKTAX, BLUETAX**

ENTIRE PROCESS SUMMARY EXAMPLES

The following is the optimal complete process for an Email Client:

1. *Client emails to ask to do a tax return / submits Jotform*

Ekta

LAST NAME

Patil

EMAIL

ekta.patil96@gmail.com

PHONE

0444503276

MESSAGE

I need helpful with tax return

2. Email template (1 Information request Email Template) is used to ask for client's information if Jotform is not submitted.

Email template requesting all information and payment required to complete a tax return (BLUE)

***ALWAYS ATTACH A COPY OF THE PRICE LIST** – price list will depend on which Email Account used by Client.*

Dear **xxx**

Thank you for your email.

We would be happy to complete your tax return via email. Please see attached a copy of our pricelist.

To begin the process simply click the following link and complete with your information:

https://www.ezytaxblue.com.au/forms-client-info

Once the above information has been received, a PayPal invoice will be emailed to you with a total breakdown of our fees and per your choice, you can make payment via one of the following:

- **PayPal** – Please note you are not required to have a PayPal account to pay this invoice
- **Bank Transfer** – Bank details will be on your PayPal invoice. Please use the reference number for ease of identifying your payment.

Once all the above information has been received and payment of the invoice is confirmed, we will email a copy of the completed tax return to be reviewed and signed via Adobesign.

Please do not hesitate to contact us if you have any further queries.

Kind Regards,
xxx

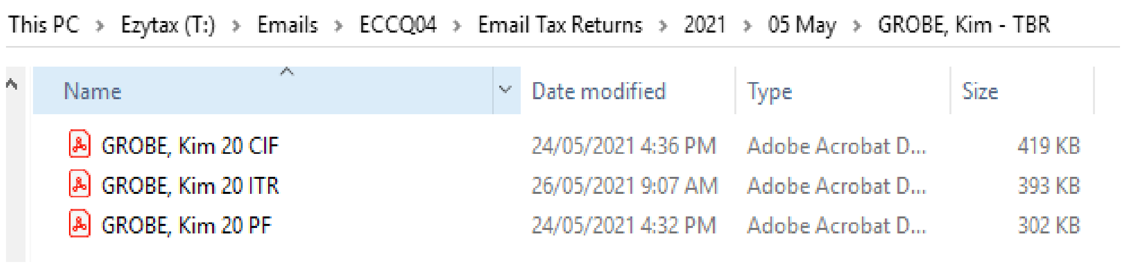
[Make sure CORRECT email signature is attached]

3. *Client Emails information.* Jira is created/updated accordingly.

Company Information Form

Company Name:	Whitelightfilm Pty Ltd
Contact Name:	Anthony B Gordon
Trading Name:	Whitelightfilm
Registered Company Address:	Street Address: #1 Cananga Close Street Address Line 2: Kamerunga City: Cairns State / Province: Qld Postal / Zip Code: 4870
Postal Address:	Street Address: #1 Cananga Close Street Address Line 2: Kamerunga City: Cairns State / Province: Qld Postal / Zip Code: 4870
Mobile Number	0408779179
Email:	tonygordon@whitelightfilm.com.au

4. PayPal invoice is created, now total fee can be calculated, and emailed to client. Client is recorded on the appropriate Station Sheet (and is classified as an Outstanding return) with the Invoice Number generated per the next invoice number for that station sheet and the amount of the invoice. JIRA is updated accordingly. **See PayPal Manual and JIRA Manual.**
5. A Client File is created on Ezytax Drive and all information and documents are stored within throughout the process.
6. As soon as the client has paid the PayPal invoice, the tax return is completed and a copy saved in the client file. JIRA is updated accordingly.
7. Post in the review channel in Slack for the return to be reviewed.
8. Completed tax return and Sub Dec are Emailed to client via AdobeSign using the Email template (2 Completed Tax Return Email Template) to be signed. **See AdobeSign Manual.**
9. *Client sends back signed documents*.
10. Signed Documents are saved in Client File and the Station Sheet is updated to show return is no longer outstanding. JIRA is updated accordingly.



11. **Tax return is lodged.** Ensure the return is saved in the correct folder on the Ezytax Drive and is labeled correctly eg. “TO BE REVIEWED”.

Alternatively the following is the optimal complete process for an Email Client if they chose to pay via direct transfer:

1. *Client Emails to ask to do a tax return*
2. Email template (1 Information request Email Template) is used to ask for client's information.
3. *Client Emails information/submits Jotform.* JIRA is updated accordingly
4. PayPal invoice is created, now total fee can be calculated, and Emailed to client. Client is recorded on the appropriate Station Sheet (as an Outstanding return) with the Invoice Number generated by PayPal. JIRA is updated accordingly
5. A Client File is created on Ezytax Drive and all information and documents are stored within throughout the process
6. *Client either requests to send Electronic Transfer rather than PayPal payment or sends fee via Electronic Transfer*
7. As soon as confirmation is given that the client has paid the tax return is completed and a copy is saved in the client file. JIRA is updated accordingly
8. Post in the review channel in Slack for the return to be reviewed.
9. Completed tax return and Sub Dec are Emailed to client using the Email template (2 Completed Tax Return Email Template) to be signed
10. *Client sends back signed documents*
11. Signed Documents are saved in Client File and the Station Sheet is updated to show return is no longer outstanding. JIRA is updated accordingly

12. **Tax return is lodged.** Ensure the return is saved in the correct folder on the Ezytax Drive and is labeled correctly eg. “TO BE REVIEWED”.