



Generate a Report of Non-Returning Clients from the uTax Software Program

This article 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.

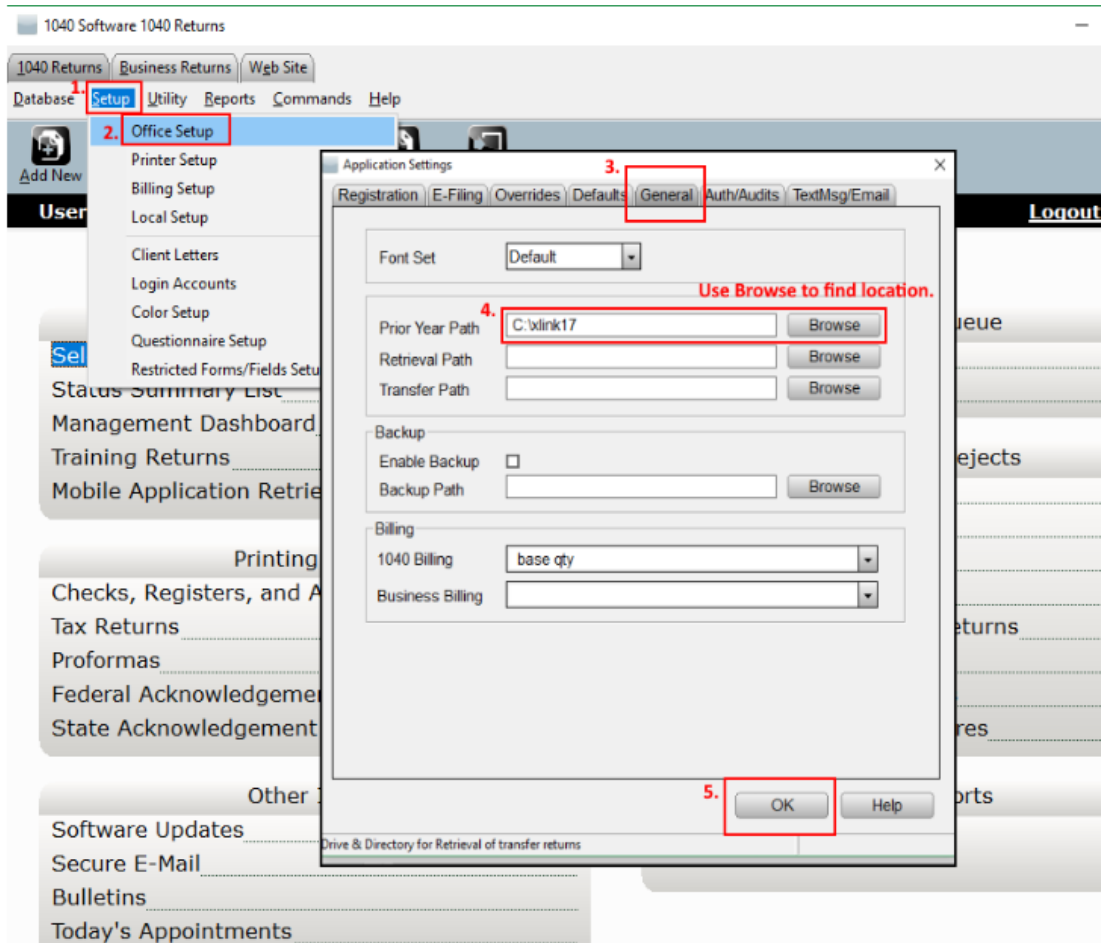
If you have additional questions about this information, please contact our **Partner Support Team** at **206-209-2653**. You can also email us at support@utaxsoftware.com.

Contents of Report: The report contains the following information

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

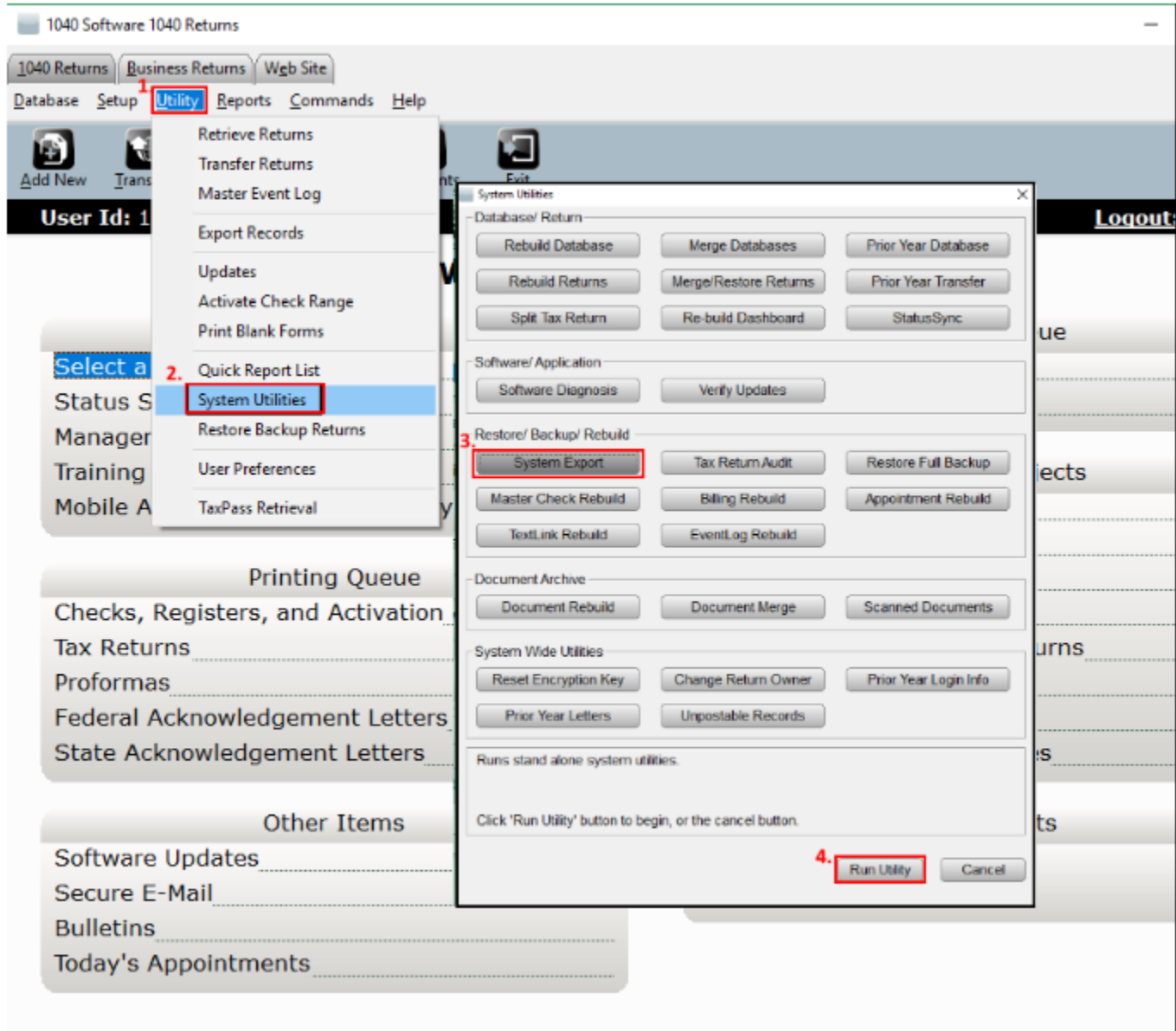
Confirm the *Prior Year Path* is entered.

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**.

