



## 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.

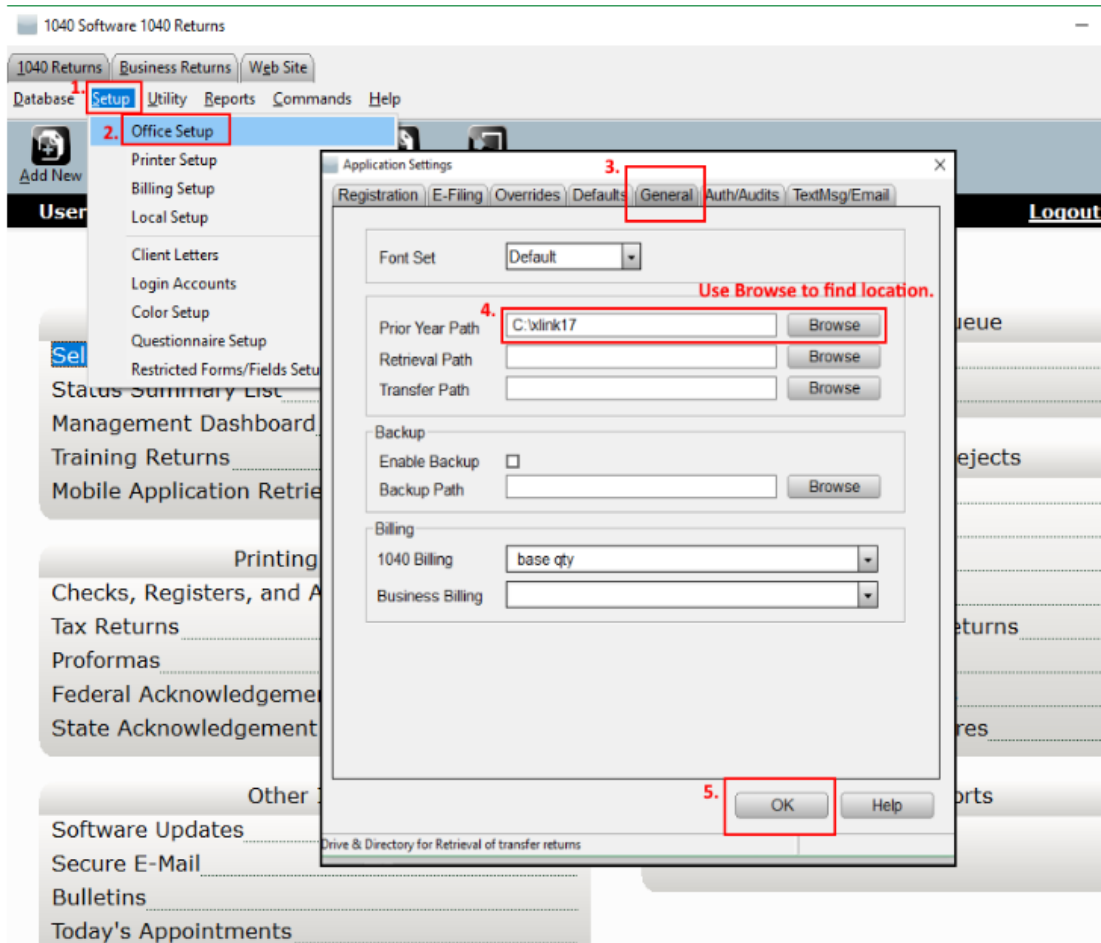
If you have additional questions about this information, please contact our **Partner Support Team** at **404-793-1593**. You can also email us **at support@tmbpro.net**.

### 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) |

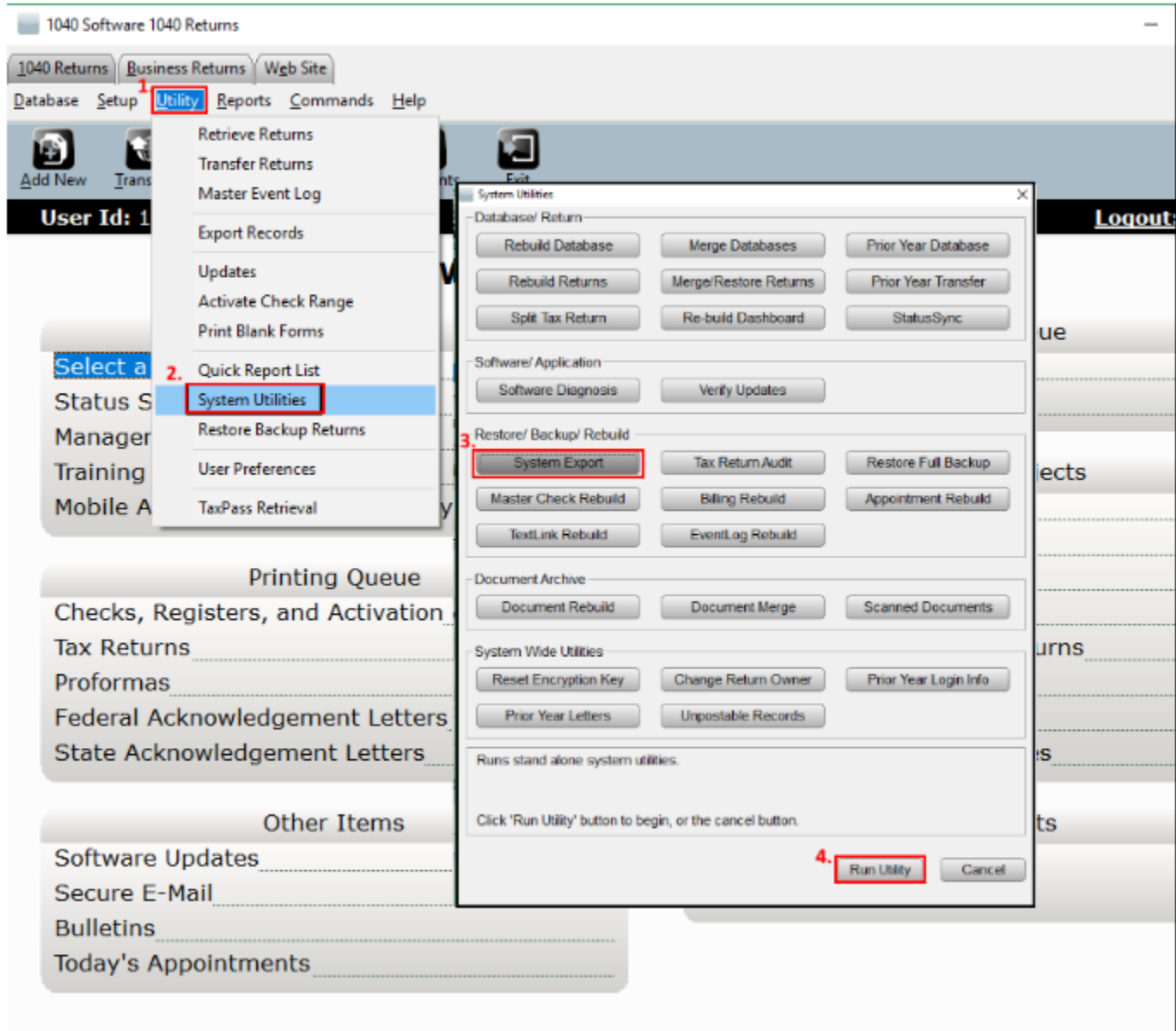
**Confirm the *Prior Year Path* is entered.**

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**.

