

# PETZ PRESS

March 2006

## A Fond Farewell - Service Manager Kathy Crouch Retires

After fifteen years working with PEI, Kathy Crouch, our customer service manager is retiring. Kathy joined the team when we were first starting to do electronic filing and has become a very important member of our organization.

She initially came aboard in the fall of 1990 with the sales team, under Craig Petz, but when Sue found out about her accounting skills, she immediately recruited Kathy for administration work. They worked together in a very small office and Kat, as she became known, had to remove the typewriter from her desk in order to enter information on the accounts receivable ledger cards.

As the business grew so did the workspace, the clientele and need for someone to head up the customer service department. Kathy was a natural since she knew almost every client by name. Because she had been with the company from the ground up, she was familiar with all the procedures, which she had been involved in developing, so her job evolved from administration and accounting to customer service. RAL applications and all accompanying paperwork are processed by her department. Need checks or other supplies? Kat and her group make sure you are shipped everything you must have to process RAL's. Have a question about the bank account your fees are being deposited into, ask Kat. Need more bank info, call customer service.



Opening a new office and have to file for another EFIN, customer service can assist you. They schedule appointments for summer training sessions, collect the data from your annual customer surveys, get materials ready and shipped for the trade shows and work year round to be sure that you, our all important customer, receive the service and information that you need.

Kathy and her husband Larry will be retiring to their property in Spirt Lake, Idaho with their family of four dogs. Kathy's two brothers and their families live in the area and they are all looking forward to spending more time together. Kat & Larry own 11 acres in a wooded area and are planning to build a new home there. Larry has already constructed a workshop and they will live in their 5th wheel trailer until

the house is complete. We will miss them and have instructed her that they must keep in touch via email and come visit us once in awhile.

Denise McFarlane, who has been with PEI for over four years, will be taking Kathy's place and heading up our customer service team. She has been trained by the best and we know that she will continue our tradition of excellent customer service.

## New Web Based "Customer Support Area"

At Petz Enterprises we pride ourselves in the fact that we listen to our customers and incorporate your suggestions into the program. Recently implemented on the Petz Enterprises, Inc. Corporate Website is our "Customer Support Area". This new section of the website provides another avenue to provide our clients with important information: Bulletins and Notices; additional downloadable material, Support Ticket tracking; online

Reports and Training/Help materials.

- Bulletins and Notices

This section provides another way of getting Bulletins and Notices provided throughout the season through the CrossLink application. You may have missed delivery on a bulletin due to account setup after a bulletin was sent out or a bulletin might have been deleted from your local database.

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## From the Mailroom:

*"I want to thank everyone that opened up their hearts and sent us those supplies. They were greatly appreciated. At the time ya'll sent us those boxes, the stores were just beginning to open and you had to stand in line for hours to get in to get even personal things. My home was not hurt too bad, so we repaired it and took in a family of four from New Orleans. My office was being built, we had the roof on but no electricity. But we put two families in there. Now my office is an office again and almost ready for tax season. All three families are working and have a place to call home. Again, I want to personally thank you for everything. Please keep us in your prayers as we over come this."*

*Thanks again,  
Odette Pea, Ponchatoula, LA*

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*Hello Jason,  
Hope that you're having a nice day today. I wanted to let you know how I'm doing with the new software. Having fun, that's what I'm doing. The software was easy to learn and format to my business. The technical support has been available when I've needed them, and accurate. I've enjoyed speaking with tech support, as they are friendly and earnest in helping me.*

*Thanks,  
Debbie Bain  
Bain's Mobile Taxes of Asheboro*

***"It is not the critic who counts, not the man who points out how the strong man stumbled, or where the doer of deeds could have done better. The credit belongs to the man who is actually in the arena; whose face is marred by the dust and sweat and blood; who strives valiantly; who errs and comes short again and again; who knows the great enthusiasms, the great devotions and spends himself in a worthy course; who at the best, knows in the end the triumph of high achievement, and who, at worst, if he fails, at least fails while daring greatly; so that his place shall never be with those cold and timid souls who know neither victory or defeat."***

***"THEODORE ROOSEVELT  
(Paris Sorbonne, 1910)***



From the Desk of Charles "Chip" Coakley  
Director of Sales

We are quickly coming to the end of the 2005 tax season, and what a season it has been! I personally want to thank everyone for all your hard work. We have seen a HUGE increase, doubling the number of IRALs from last season, with many of you offering IRAL's for the first time and experiencing great success.

Our transmitter Markup Program has also been very successful, with many new Crosslink users signing up for this program, getting additional revenue while covering the renewal of their software for the 2006 tax season!

Finally, as a reminder we will be mailing out your renewal invoices. So please watch your mail and send them back to us! I am also excited about the upcoming IRS show's, For those of you that are able to attend, I hope you can take a few minutes to come by our booth and say hello. I really look forward to seeing you again.

Thanks again for all your hard work and a very successful 2005 Tax season.

Respectfully,  
Charles Coakley

*(Web Based "Customer Support Area Continued)*

• Support Ticket Tracking

Have you called in with an issue or question about the software, and can't remember the answer you received? This section provides you with the ability to review any Support Tickets created for your transmitting User ID. It also provides you with the ability to see any outstanding Support Tickets, or create a Support Ticket without calling into Technical Support. Support Tickets can now be created with our Technical Support department by phone, CrossLink Secure email (from within the CrossLink application), standard email and our new online Support site.

• Online Reporting

This feature provides Account Holders and Transmitting User IDs with an online report of fees collected during the season. Account holders have the ability to see all of your Transmitting User IDs in one location, and at your convenience. Log into the Customer Support area, visit the Reports section and run any report for information regarding your current status.

Don't see something you need? We are here to serve your reporting needs and will look into providing you with the information you request. Contact Technical Support with one of the several methods provided with detailed information regarding what you would like to see, and we will begin reviewing the requirements of your request.

• Training/Help Materials

This section provides us with a way of posting training materials on our software for you and your staff. Research and development are working to provide several mechanisms of training both in written and video materials. The new training materials are currently in the works and will be provided in the near future.

How Do I Access the Site?

In order to access the site, visit us at our Petz Enterprises, Inc. corporate website at <http://www.petzent.com>. From the corporate website, you will need to access the CrossLink section by utilizing the Jump to link in the top right corner. Selecting CrossLink in the dropdown box and clicking the Go button will take you to the CrossLink section of the corporate site. Clicking the Support Login button will prompt you for a Username and Password. Using your Account Code will grant you access to the reports for all transmitting User IDs, and using your transmitting User ID will limit the reports to the ID accessed.

We look forward to your feedback on our new online support system. Feel free to make suggestions as we work together to provide the level of support you need to be successful!

## End of Season Bank Information

### HSBC:

RAL's - Last day for RAL's is April 30th.

RAC's - Last day for RAC's is October 15th if extended season option was elected.

Check Prints - All check print authorizations will be switched to Bank Check Print on June 1st and all checks are mailed to taxpayer unless special arrangements are made with the bank.

Check Stock - Check stock expires June 15th or 60 days after issue date. You will be receiving an End of Season Check Stock Affidavit, which includes all unused check stock information along with instructions for disposal.

### Bank One:

RAL's - Last day for RAL's is April 28th.

RAC's - Last day for Bonus applications is October 16, 2006.

Check Prints - All check print authorizations will be switched to Bank Check Print on September 15th. At that point all checks are mailed to taxpayer unless special arrangements are made with the bank.

Check Stock - At the end of the tax season, all checks including those that have been voided, damaged, and/or unused must be returned to TRP, or as otherwise instructed by your Transmitter. Please send the check stock by traceable means such as certified US mail, UPS with a tracking number, etc. to:

#### Tax Related Products

DDA Operations

1111 Polaris Pkwy, OH1-1021

Columbus, OH 43240

Before closing for the season, please inspect your tax office carefully for miscellaneous checks. Do not destroy check stock. You are accountable to your Transmitter and to TRP for each check assigned to you throughout the season.

### Santa Barbara Bank and Trust:

RAL's - Last day for RAL's is April 18th.

RT's - Last day for Refund Transfer Applications is October 31st

Check Prints - All check print authorizations will be switched to Bank Check Print on October 17th. At that point all checks are mailed to taxpayer unless special arrangements are made with bank.

Check Stock - All unused check stock can be destroyed at the end of the tax season, or it can be sent back to SBBT. If you destroy the unused check stock, please mail or fax SBBT a letter (with the ERO's signature) indicating the range of check numbers destroyed.

If you return the unused check stock, please mail to:

SBBT RAL - Shipping Department

P.O. Box 1390

Solana Beach, CA 92075

A copy of your check control log should be included with your unused check stock listing all printed and voided checks. You may download a check reconciliation form to include with your check control log. Unused RAL/RT Applications can be discarded. PLEASE DO NOT SEND BACK UNUSED RAL/RT APPLICATIONS.