

# etax local

# Induction



ETAX LOCAL MEMBER INDUCTION  
Getting to know Etax Local

# Welcome



You are now a Member of the **Etax Local Network**

Etax Local provides a **unique opportunity for accountants and bookkeepers** to incorporate additional business and tax accounting services into their business without needing to become tax experts themselves.

Through our **National Support Office** Members are provided with the tools, resources and support to help them incorporate Etax Local's comprehensive menu of services into those they can coordinate for their clients.

# Who are we?



## Getting to know the **Etax Local Team**

**At Etax Local, we are here to support you when you need it most.**

We have experts in the areas of:

- **Accounting**
- **Administration**
- **Information Technology**
- **Business Development**
- **Marketing**
- **Human Resources**

# Accounting



## Getting to know the **Etax Local Team**

We have senior staff on site at our National Support Office who have many years of experience and a wealth of tax knowledge.

This team of **Highly Qualified Accountants** are able to assist with any queries you may have in regard to processing, pricing and servicing clients. Their support and guidance is invaluable to Members as they start their journey with Etax Local.

### **Accounting Team**



Urgent query or issue: 1300 174 689

Client or job specific query: Login to [EPM](#) and write a new note in the job's **Job Notes** tab

All other requests via Service Requests: <https://services.etax.com.au>

# Administration



## Getting to know the **Etax Local Team**

Our Administration team handle the administrative needs of the internal accounting team. They also take care of **Member correspondence, client and lead enquiries** and monitor and assign **Service Requests** to the correct team member to ensure they are actioned quickly.

The administration role is broad and varied and they are an invaluable link between internal and external staff as jobs progress through the EPM.

### **Administration Team**



General Queries: 1300 174 689

Email: [admin@etaxlocal.com.au](mailto:admin@etaxlocal.com.au)

Service Request: <https://services.etax.com.au>

# I.T.



## Getting to know the **Etax Local Team**

At Etax Local we have an Information Technology team with highly experienced **Developers** dedicated to the continued development of **Etax Local's advanced 'cloud based' technology.**

As a Member you also now have access to all our systems and ongoing assistance from the **IT Support** team.

**IT Support**



Urgent query or issue: 1300 174 689

Contact via Service Request : <https://services.etax.com.au>

Email: [admin@etaxlocal.com.au](mailto:admin@etaxlocal.com.au)

# Marketing



## Getting to know the **Etax Local Team**

The Marketing team look after Member, client facing and B2B communications, including:

- **Marketing communications** and **business development**
- **Promotions** and **event coordination**
- **Business process, compliance** and **marketing resources**
- **Approval** and **proofing** for Member promotions and communications

### **Marketing Team**

General enquiries and guidance: [marketing@etaxlocal.com.au](mailto:marketing@etaxlocal.com.au)

Graphic Design requests via Service Request: <https://services.etax.com.au>



# Business



## Getting to know the **Etax Local Team**

The Business and Relationship Management team are a key link between all entities, assisting with:

- **Business and Relationship Management**
- **Member support and communications**
- **Sponsorship and alliance development**
- **Lead allocation and client support**

### **Business Development and Relationship Team**

General enquiries and guidance: [admin@etaxlocal.com.au](mailto:admin@etaxlocal.com.au) Att: BDM team

Graphic Design requests via Service Request: <https://services.etax.com.au>





# HR and Training



## Getting to know the **Etax Local Team**

Our experienced **HR and Training** team facilitate additional career training for Members (when required) and provide the necessary communications relating to your Etax Local Membership.

These include:

- Provision and approval of all **documentation, applications and contracts**
- **Industrial Relations**
- Communication of **Operational Health and Safety** (OHS)
- **Training support and delivery** via our LMS

**HR and Training Team**



Urgent Enquiries: 1300 174 689

Training queries: [training@etaxlocal.com.au](mailto:training@etaxlocal.com.au)

Queries relating to HR documentation: use the messages tab within your personal **EPM** profile

All other requests via Service Request: <https://services.etax.com.au>

# Contacting us



## Service Requests – serving you better

So that we can best assist you in an effective and timely manner, the preferred method of contact, aside from urgent queries, is via a **Service Request (SR)**.

This enables the Head Office team to allocate your problem/query to the correct person or department. The progress of each SR can then be tracked and monitored. This ensures that all requests are actioned and result in an acceptable resolution.

**Note:** Remember to monitor the progress of your Service Requests and action requests from the assignee promptly.

### Service Requests



Raise a service request via our services intranet: <https://services.etax.com.au>

Watch our videos on Raising SRs and Actioning SRs

# System Access



Providing **the tools you need** for your business



## Services Intranet

Services Requests and Resource Library.



## Etax Practice Manager (EPM)

Etax Local's unique, cloud based accounting and tax preparation platform.



## Learning Management System (LMS)

Online training delivery



## Tax Portal (TAP)

Access and load clients into the ATO Tax Portal. (Tax qualified Members only)

# Services Intranet



Everything **at your fingertips**

You will notice that you now have access to a **broad range of resources and information** so it is worth having a good look around.

These include:

- Service Desk for creating/monitoring Service Requests
- EPM training modules
- Marketing materials and templates
- And many more useful resources for your business

**Services Intranet**



Using the login details you have been given by our IT department

Login to: <https://services.etax.com.au/etaxlocal>

# EPM



## Ground breaking technology

The IT department has developed a unique processing system, specifically to service the needs of Members.

### Etax Practice Manager (EPM)

Members can process jobs remotely using our secure 'cloud based' technology.

#### EPM Features:

- Manage client details and process jobs remotely
- Upload and store client documents
- Communicate with clients and head office
- User training documents and videos
- Access to standard drafts and templates
- Access to helpful sales and marketing resources

### EPM Access and Training

Log in to EPM: <https://pm.etax.com.au>

Open the **HELP** tab in EPM for links to training modules to help get you started  
Watch step by step Training Videos in via the [Documents and Resources](#) tab

# First 5 Steps



## Getting down to business

1. Become familiar with the **EPM** and how to use it – training modules are available via the help tab and training folder in EPM and via our Services Intranet.
2. Watch our **Getting Started** presentation located in the Training folder in EPM.
3. Explore our **Services Intranet** and all the resources that are available to you on there.
4. Get in touch with your **existing contact database, business networking groups and local community groups** to introduce yourself and/or the taxation services you can now coordinate for them through your membership with Etax Local.

**Please contact Head Office with any queries or problems you have with the above items**

Urgent Enquiries: 1300 174 689 General enquiries: [admin@etaxlocal.com.au](mailto:admin@etaxlocal.com.au)

All other requests via Service Request: <https://services.etax.com.au>



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