2017 PREMIUM PRO TRAINING

DALLAS AGENDA
1- 1/2 DAYS

2017 PREMIUM PRO TRAINING SEMINARS

Dallas Training Agenda (Day One - Monday)

Continental Breakfast (8:00am – 8:30am)

Session 1 (8:30am – 9:00am)
Overview

• Interface	• Toolbars	• User Options	• Help
• Navigation	• Dockable Frames	• Software Updates	

Session 2 (9:00am – 10:00am)
Company Information

• General Information	• Fee & Rate Schedules	• Filing Info Schedule	• Sorting and Filtering
• Input Schedules			

Break (10:00am – 10:15am)

Session 3 (10:15am – 10:45am)
Data Entry

• Rollover	• Data Entry	• Import Functionality

Session 4 (10:45am – 12:00pm)
Filing Returns

•Reviewing Returns	• Company Options	• Form Status	• Calculation Process
•Adjusting Returns	• Jurisdiction Options	• Field Colors	

Lunch (12:00pm – 1:00pm)

Session 5 (1:00pm – 1:45pm)
Retaliatory Calculations

- Reviewing & Adjusting Returns
- Retaliatory Options
- Retaliatory Input Schedule

Session 6 (1:45pm – 3:00pm)
Supporting Features

• Locking Returns	• Return Instructions	• State Filing Information	• Release Notes
• Attachments and Links	• Preparer Notes	• RSS Feeds	• Comment & Mark Up Tools
• Amended Filings	• Viewing Multiple Returns		

Break (3:00pm – 3:15pm)

Session 7 (3:15pm – 4:15pm)
Management Schedules and Reports

• Check Request Schedule	• Summary of Taxes	• Audit Report	• Actions Report
• Check Request Export	• Override Report	• Comparison Reports	

Session 8 (4:15pm – 5:00pm)
Estimated Taxes & Print

• Input Schedule	• Summary of Taxes	• Print to PDF	• Right Select Print
• Estimate Returns	• Print Icon	• Print Menu	

TriTech
Insurance Tax Specialists
www.tritechsoft.com 800-380-6407

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Dallas Training Agenda (Day Two - Tuesday)

Continental Breakfast (8:00am – 8:30am)

Session 9 (8:30am – 9:00am)
Electronic Filing

• Filing via TriTech	• Filing via OPTins	• Web Login	• Efile Assistant

Session 10 (9:00am – 9:30am)
GFA Tracking System

• Input Schedules	• Summary Schedule	• Check Requests	• Help
• Import			

Session 11 (9:30am – 10:15am)
FormsPlus

• Company Information	• Reviewing & Adjusting Forms	• Options	• Reports
• Data Entry	• Form Status	• Summary Schedule	• Print

Break (10:15am – 10:30am)

Session 12 (10:30am – 11:30am)
Municipal

• Company Information	• Import	• Check Requests	• Print
• Address, Rate, and Fee Schedules	• Reviewing & Adjusting Returns	• Summary Schedules	• Digitized Signature
• Input Schedules	• Options	• Reports	

Session 13 (11:30am – 12:00pm)
Calendar

• Overview	• Date List	• Custom Entries	• Updates
• Calendar Interface	• Queries	• Reminders	

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