

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)



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

Break (3:00pm – 3:15pm)

Session 7 (3:15pm – 4:15pm)

Management Schedules and Reports

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

Session 8 (4:15pm – 5:00pm)

Estimated Taxes & Print

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

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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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