

REGIONAL AGENDA

FULL DAY

2017 PREMIUM PRO TRAINING SEMINARS

Regional Training Agenda (Full Day)

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 | • Sorting and Filtering | • Rollover |
| • Input Schedules | • Filing Info Schedule | • Data Entry | • Import Functionality |

Break (10:00am – 10:15am)

Session 3 (10:15am – 11:15am)

Filing & Retaliatory Returns

- | | | | |
|-----------------------------------|------------------------------------|-----------------------|------------------------------|
| • Reviewing and Adjusting Returns | • Company and Jurisdiction Options | • Calculation Process | • Retaliatory Input Schedule |
| • Form Status | • Field Colors | • Retaliatory Returns | • Retaliatory Options |

Session 4 (11:15am – 12:00pm)

Supporting Features

- | | | | |
|-------------------------|-----------------------|----------------------------|----------------------------|
| • Locking Returns | • Return Instructions | • State Filing Information | • Release Notes |
| • Attachments and Links | • Preparer Notes | • Comment & Markup Tools | • Viewing Multiple Returns |
| • Amended Filings | | | |

Lunch (12:00pm – 1:00pm)



www.tritechsoft.com 800-380-6407

© 2015 TriTech Software Development Corp. All rights reserved. Premium Pro is a registered trademark.

TriTech Software Development Corp is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. For more information regarding refund, complaint and program cancellation policies, please contact our offices at (800) 380-6407.

REGIONAL AGENDA

FULL DAY

2017 PREMIUM PRO TRAINING SEMINARS

Session 5 (1:00pm – 1:30pm)

Management Schedules and Reports

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

Session 6 (1:30pm – 2:00pm)

Estimated Taxes & Print

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

Session 7 (2:00pm – 2:30pm)

Electronic Filing

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

Session 8 (2:30pm – 3:00pm)

GFA Tracking System

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

Break (3:00pm – 3:15pm)

Session 9 (3:15pm – 3:45pm)

FormsPlus

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

REGIONAL AGENDA

FULL DAY

2017 PREMIUM PRO TRAINING SEMINARS

Session 10 (3:45pm – 4:30pm)

Municipal

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

Session 11 (4:30pm – 5:00pm)

Calendar

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