REGISTER NOW

2019 PREMIUM PRO TRAINING SEMINARS

DALLAS AGENDA: DAY ONE

FULL DAY

Dallas Training Agenda - Day One

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 Schedule	 Sorting and Filtering 	Rollover
Input Schedule	Filing Info Schedule	Data Entry	 Import Function
Break (10.00 am 10.1)	F a		
Break (10:00am-10:1:	sam)		
Break (10:00am-10:1			
Session 3 (10:15am-1 Filing & Retaliatory Return • Reviewing and	0:45am) Is • Company and	Calculation Process	Retaliatory Options
Session 3 (10:15am-1 Filing & Retaliatory Return • Reviewing and Adjusting Returns	0:45am) is • Company and Jurisdiction Options	Calculation ProcessRetaliatory Returns	Retaliatory Input
Session 3 (10:15am-1 Filing & Retaliatory Return • Reviewing and	0:45am) Is • Company and		• •
Session 3 (10:15am-1 Filing & Retaliatory Return • Reviewing and Adjusting Returns • Form Status	0:45am) <u>is</u> • Company and Jurisdiction Options • Field Colors		Retaliatory Input
Session 3 (10:15am-14 Filing & Retaliatory Return Reviewing and Adjusting Returns Form Status Session 4 (10:45am-12)	0:45am) <u>is</u> • Company and Jurisdiction Options • Field Colors		Retaliatory Input
Session 3 (10:15am-1 Filing & Retaliatory Return • Reviewing and Adjusting Returns • Form Status	0:45am) <u>is</u> • Company and Jurisdiction Options • Field Colors		Retaliatory Input
Session 3 (10:15am-14 Filing & Retaliatory Return Reviewing and Adjusting Returns Form Status Session 4 (10:45am-12)	0:45am) <u>is</u> • Company and Jurisdiction Options • Field Colors		 Retaliatory Input Schedule State Filing
Session 3 (10:15am-1 Filing & Retaliatory Return • Reviewing and Adjusting Returns • Form Status Session 4 (10:45am-1 Supporting Features	0:45am) Is Company and Jurisdiction Options Field Colors 2:00pm) Amended Filings	Retaliatory Returns	Retaliatory Input Schedule

Lunch (12:00pm-1:00pm)



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2019 PREMIUM PRO TRAINING SEMINARS

DA

DALLAS AGENDA: DAY ONE

FULL DAY

Session 5 (1:00pm-1:4	- /		Page 2 of 3
 Management Schedules a Payment Request Schedule Payment Request Export 	 nd Reports Summary of Taxes Override Report 	Audit ReportComparison Report	Actions Report
Session 6 (1:45pm-3:0 Estimated Taxes & Print)0pm)		
Input Schedule	Summary of Taxes	Print to PDF	Right Select Print
Estimate Returns	Print Icon	Print Menu	
Break (3:00pm-3:15p	m)		
Session 7 (3:15pm-4:2 Electronic Filing	L5pm)		
Filing via TriTech	Filing via OPTins	Web Login	Efile Assistant
Session 8 (4:15pm-5:0 FormsPlus)0pm)		
Company Information	Reviewing & Adjusting	Options	Reports
Data Entry	FormsForms Status	Summary Schedules	• Print



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REGISTER NOW

2019 PREMIUM PRO TRAINING SEMINARS

DALLAS AGENDA: DAY TWO

HALF DAY

Dallas Training Agenda - Day Two

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

Session 1 (8:30am-9:00am)

Calendar

Overview	Date List	Custom Entries	Updates					
Interface	Queries	Reminders						
Session 2 (9:00am-10:00am)								
Allocator								
 Geo-Coding 	 Process Premiums 	 Correcting Address 	 Options 					
Creating a file	Reports	Appending Files	Export					
Break (10:00am-10:1	5am)							
Session 3 (10:15am-11:15am) Municipal								
Company Information	Input Schedules	Options	Reports					

•	Address, Rate and Fee	•	Import	•	Payment Request	•	Print
•	Schedules	•	Reviewing and Adjusting Returns	•	Summary Reports	•	Digitized Signature

Session 4 (11:15am-12:00pm)

GFA Tracking System

•	Input Schedules	٠	Summary Schedules	٠	Payment Request	٠	Help
٠	Import						



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