



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
- Navigation
- Toolbars
- Dockable Frames
- User Options
- Software Updates
- Help

Session 2 (9:00am-10:00am)

Company Information

- General Information
- Input Schedule
- Fee & Rate Schedule
- Filing Info Schedule
- Sorting and Filtering
- Data Entry
- Rollover
- Import Function

Break (10:00am-10:15am)

Session 3 (10:15am-10:45am)

Filing & Retaliatory Returns

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

Session 4 (10:45am-12:00pm)

Supporting Features

- Locking Returns
- Attachments and Links
- Amended Filings
- Return Instructions
- Preparer Notes
- Viewing Multiple Returns
- State Filing Information
- Release Notes

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



DALLAS AGENDA: DAY ONE

FULL DAY

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Session 5 (1:00pm-1:45pm)

Management Schedules and Reports

-
- Payment Request Schedule
 - Payment Request Export
 - Summary of Taxes
 - Override Report
 - Audit Report
 - Comparison Report
 - Actions Report
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Session 6 (1:45pm-3:00pm)

Estimated Taxes & Print

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

Break (3:00pm-3:15pm)

Session 7 (3:15pm-4:15pm)

Electronic Filing

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

Session 8 (4:15pm-5:00pm)

FormsPlus

-
- Company Information
 - Data Entry
 - Reviewing & Adjusting Forms
 - Forms Status
 - Options
 - Summary Schedules
 - Reports
 - Print



DAY 2

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-10:15am)

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
- Summary Schedules
- Payment Request
- Help
- Import