Help



REGIONAL AGENDA: FULL DAY

User Options

Software Updates

FULL DAY

Toolbars

Dockable Frames

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| <u> </u> | | | |
|----------|----------|--------|------------|
| Regional | Iraining | Agenda | (Full Day) |
| | | | (|

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

| Session 1 | (8:30am – 9:00am) |
|-----------|-------------------|
| O | |

Overview

Interface

Navigation

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

| Company | Inform | atior |
|---------|--------|-------|
|---------|--------|-------|

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

Session 4 (11:15am – 12:00pm) Supporting Features

| • L | ocking Returns | Return Instructions | State Filing Information | Release Notes |
|-----|-----------------------|---------------------|--------------------------|--------------------------|
| • A | Attachments and Links | Preparer Notes | Comment & Markup Tools | Viewing Multiple Returns |
| | | | | |

Amended Filings

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



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| Management Schedules and Re | epond | | |
|---|---|----------------------------------|------------------------------------|
| Payment Request Schedule | Summary of Taxes | Audit Report | Actions Report |
| • Export Payment Request | Override Report | Comparison Reports | |
| Session 6 (1:30pm – 2:00 Estimated Taxes & Print | 0pm) | | |
| Input Schedule | Summary of Taxes | Print to PDF | Right Select Print |
| Estimate Returns | • Print Icon | • Print Menu | |
| Session 7 (2:00pm – 2:30 |) nm) | | |
| Electronic Filing | opin) | | |
| | Filing via OPTins | • Web Login | • Efile Assistant |
| Electronic Filing | Filing via OPTins | Web Login Ocheck Requests | • Efile Assistant • Help |
| Electronic Filing • Filing via TriTech Session 8 (2:30pm – 3:00 GFA Tracking System | • Filing via OPTins Opm) | _ | |
| Electronic Filing • Filing via TriTech Session 8 (2:30pm – 3:00 GFA Tracking System • Input Schedules | • Filing via OPTins Opm) • Summary Schedule | _ | |
| Electronic Filing • Filing via TriTech Session 8 (2:30pm – 3:00 GFA Tracking System • Input Schedules • Import | Filing via OPTins Opm) Summary Schedule N) | _ | |
| Electronic Filing • Filing via TriTech Session 8 (2:30pm – 3:00 GFA Tracking System • Input Schedules • Import Break (3:00pm – 3:15pm Session 9 (3:15pm – 3:4! | Filing via OPTins Opm) Summary Schedule N) | _ | |



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Session 10 (3:45pm – 4:30pm) Municipal

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

Session 11 (4:30pm - 5:00pm)

Calendar • Overview

Calendar Interface

- Date List
- Queries

Custom Entries
 Reminders

Updates

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