REGIONAL AGENDA: FULL DAY

FULL

FULL DAY

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)

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Session 5 (1:00pm – 1:30pm)
Management Schedules and Reports

• Payment Request Schedule	• Summary of Taxes	• Audit Report	• Actions Report
• Export Payment Request	• 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

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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	