Help



REGIONAL AGENDA: FULL DAY

User Options

Software Updates

FULL DAY

Toolbars

Dockable Frames

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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
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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

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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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