



# TriTech Software Newsletter



*There's too much information! I can't keep states straight from each other!*

Want to track the status of a specific state for all your companies? There's now a separate Return Status Schedule by State. You can track the status of a specific state for all your companies in one schedule. Now you can choose to focus the way that best suits you (be it by state or by company) so you can cut clutter, stay on top of your returns, and save your peace of mind!

[Read More >>](#)

*It sure would be nice if the OPTins efil-ing process was faster...*

This is perhaps one of our biggest developments yet! For the 2020 product, we're introducing Auto E-File for OPTins states. All you have to do is plug in your information under options, and you can auto efile with a single click! The process runs in the background so you can keep your momentum going. This is a game changer for this year!

[Read More >>](#)

*It's so hard to keep up with my team! I never seem to know when returns are ready to move along the pipeline!*

There's now a notification tool just for this purpose! You can have the software send notifications when certain conditions are met—like when a return is ready to move to the next step. No more getting lost in the weeds!

[Read More >>](#)

*I wish there was a better way to see return information at a glance...*

We've got good news—a brand new coversheet feature is coming to the software this year! The coversheet helps with the review process and completion of your returns by pulling in key information to show you at a glance. This is a huge lifesaver that we know will save you hours this tax season!

[Read More >>](#)

*And that's not all...* See all our New Features in the video coming soon!

## Dates to Remember: Initial Releases

Nov. 15:  
FormsPlus  
Dec. 2:  
Municipal  
Allocator  
Dec. 16:  
Premium Tax

## Tax Season Support

Extended Support:  
Jan 2 - Mar 1  
Saturday Support:  
Jan 18 - Mar 1

## TriTech delves into AUTOMATION

Automation is at the forefront of the technology sector right now. We're in the midst of some really fascinating changes that will lead us into the next era of software. One of TriTech's core values is Deliberate Innovation, and as you might imagine, we stepped up to the plate for automation to see what we could do to make your jobs more efficient, streamlined, and less stressful. We've approached automation from many different angles. We already have a major feature launching this year, and more are on the horizon!

The feature we already have set to release with the 2020 edition of Premium Pro Enterprise is auto efile. This feature works for all OPTins states and allows you to enter your OPTins information in one place. Then, all you have to do is right click a return and select "Auto Efile." The process runs in the background so you can keep working on your other tasks. It'll only notify you if there's an error-- and like always, the green efiled "e" appears when it's done. You can auto efile multiple returns at once! This new feature will save you tons of time by going through the OPTins process for you.

We're building and testing other features right now, too. We're acting on ideas and requests that came up during our annual client Advisory Meeting this year to meet your needs and make your workflow more efficient. Thank you to everyone who has opened up to us about where we can improve and add automation! If you have more ideas, let us know... we're excited to hear them!





## More than just software and tax services...

### Serve. Grow. Transform



Last year TriTech donated over \$100,000 to charity, and we're on track to beat that this year! We volunteer and donate to a number of charities. This year, we partnered with Royal Family KIDS Camps for a week at the beginning of August. This camp was for kids who are in the foster system. We threw everyone a huge birthday party.

*"We were reminded about what makes a family, how strong children are, and what really matters in the world. We were able to make a difference in their lives, even if just for a day."* – Tonya Wilson

We also volunteer for Meals on Wheels and have delivered dozens of meals to seniors in our area! It's an incredible opportunity for us to reach out to those who need us, and to learn from them, as well.



Finally, we're raising money for Hope of Life to build houses in Guatemala! We served there a few years ago and are planning to do so again!

### Welcome to the Team!

TriTech is proud to welcome several new external employees to our team: Taina Bottoms, David Fleming, Jack Hoffen, Kathleen Mackey, and Cecilia Ayroso. They each bring incredible tax industry experience to the table

and we can't wait to see how they help us evolve. We're so glad to have them!

### Construction

Construction on our building has officially begun! Our new parking lot is complete, and the addition to our building is moving along nicely. The journey hasn't been without some potholes, of course... like the day when our communication line was accidentally cut! We've learned a lot from the process so far and we're looking ahead with eager anticipation. We can't wait to show you what it all looks like when it's done!



## TriTech Consulting

Is just preparing state tax returns enough? Overpaying your state insurance premium and retaliatory taxes can cost you millions of dollars. Most tax departments don't have the staff or time to thoroughly review these state tax liabilities. But don't worry—we have an incredible team of consultants that will step in and help you turn your tax department into a profit center as opposed to just a cost center!

Gene Capobianco, Chris Gustafson, and Bob Sartori have over a hundred years of combined insurance tax industry experience across many major insurance companies and accounting firms. Our reviews are the key to your success, and to knowing you aren't leaving significant money on the table.

All our reviews are contingent fee based, so you only pay if we add value. Our process is clean and simple: we request information in advance, come on site for one or two days, and then give you a written report. We do follow-ups remotely. Our reviews can dramatically improve your tax planning and audit results.

You don't want to miss this amazing opportunity. Go to <https://tritechsoft.com/consulting> to learn more and contact us. Put us to work for your company today!

