

**VIRTUAL AGENDA: HALF DAY**

2021 PREMIUM PRO TRAINING SEMINARS

Regional Training Agenda (Half Day -Webinar)

Session 1 (10:00am – 10:30am)**Interface & Options**

- Interface
- Dockable Frames
- User Options
- Form Status
- Navigation
- Software Updates
- Company Options
- Help

Session 2 (10:30am – 11:00am)**Pre Tax Season Prep Work & Initial Release**

- General Information
- GFA Schedule
- Data Entry
- Rollover
- Input Schedule
- Prepayments
- Attachments
- Import Function

Break (11:00am – 11:10am)**Session 3** (10:10am – 11:40am)**Filing & Retaliatory Returns**

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

Session 5 (11:40am – 12:00pm)**Supporting Features**

- Locking Returns
- Notifications
- Preparer Notes
- State Filing Information
- Attachments & Links
- Return Instructions
- Viewing Multiple Returns
- Release Notes
- Batch Attachment
- Coversheets

Lunch (12:00pm – 1:00pm)

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Session 5 (1:00pm – 1:25pm)**Schedules and Reports**

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- Payment Request Schedule
 - Payment Request Export
 - Sort Payment Request Preview
 - Summary of Taxes
 - Override Report
 - Audit Report
 - Comparison Report
 - Return Status
 - Return Status by State
 - Actions Report
 - Notes

Session 6 (1:25pm – 1:55pm)**Electronic Filing**

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- Filing via OPTins
 - Auto E File via OPTins
 - Filing via TriTech
 - Web Login
 - Online Filing Assistant

Break (1:55pm – 2:10pm)**Session 7** (2:10pm – 2:35pm)**Estimated Taxes & Print**

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- Input Schedule
 - Estimate Returns
 - Liability (Gross or Net)
 - Summary of Taxes
 - Print Icon
 - Print to PDF
 - Print Menu
 - Right Select Print

Session 8 (2:35pm – 3:00pm)**Calendar**

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- Overview
 - Interface
 - Date List
 - Queries
 - Custom Entries
 - Reminders
 - Updates
 - Export