

# **2010 Premium Pro Dallas Training Agenda**

## **DAY ONE**

**Continental Breakfast (8:00am – 8:30am)**

### **Session 1 (8:30am – 9:30am)**

#### **Overview**

- Interface
- Navigation
- Toolbars
- Dockable Frames
- Admin Tool
- Roles/Permissions
- Assignments

### **Session 2 (9:30am – 10:15am)**

#### **Company Information**

- General Information
- Annual Statement Schedules
- GFA Input Schedule
- Fee & Rate Schedules

**Break (10:15am – 10:30am)**

### **Session 3 (10:30am – 11:00am)**

#### **Data Entry**

- Rollover
- Data Entry
- Import Functionality

### **Session 4 (11:00am – 12:00pm)**

#### **Filing & Retaliatory Returns**

- Reviewing and Adjusting Returns
- Company and Jurisdiction Options
- Form status
- Field Colors
- Calculation Process
- Retaliatory Calculations

**Lunch (12:00pm – 1:00pm)**

### **Session 5 (1:00pm – 2:00pm)**

#### **Supporting Features**

- Preparer Notes

- Attachments
- Return Instructions
- State Filing Information

### **Session 6 (2:00pm – 3:00pm)**

#### **Management Reports**

- Summary Schedules
- Check Request Export
- Override Report
- Audit Report

### **Break (3:00pm – 3:15pm)**

### **Session 7 (3:15pm- 4:00pm)**

#### **Estimated Taxes & Print**

- Input Schedule
- Estimate Returns
- Summary of Taxes
- Print Icon
- Print to PDF
- Print Menu

### **Session 8 (4:00pm- 4:30pm)**

#### **Electronic Filing**

- Mandatory Online Filing
- Filing via TriTech
- Filing via OPTins
- Web Efile Assistant

### **Session 9 (4:30pm-5:00pm)**

#### **GFA Tracking System**

- Input Schedules
- Import
- Summary
- Check Requests

## **DAY TWO**

### **Continental Breakfast (8:00am – 8:30am)**

### **Session 10 (8:30am – 9:15am)**

#### **FormsPlus**

- Company Information
- Data Entry
- Reviewing and Adjusting Forms

- Form Status
- Summary Schedules
- Reports
- Print

### **Session 11 (9:15am –10:15am)**

#### **Allocator**

- Processing Premiums
- Allocation Reports
- Filters
- Custom Reports
- Municipal Boundary Map
- Appending Files
- Export

### **Break (10:15am – 10:30am)**

### **Session 12 (10:30am – 11:30am)**

#### **Municipal**

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

### **Session 13 (11:30am – 12:00pm)**

#### **Calendar**

- Integration & Migration
- Calendar View
- Queries