

ftwilliam.com 5500 software: "Train the Trainer" - How to get the most out of your ftwilliam.com 5500 software

Presented by:

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Agenda

- Using 55Autofill
- Bring data forward
- Run edit checks
- Print options
- Attachments
- Upload/download Center
- 8955-SSA preparation & Discussion of filing options

Agenda

- Using the 5500 Workflow Grid
- Use batch 5558
- Set up a portal user
- Invite portal user to sign
- View portal user
- Local Signatures
- Amended filings and DFVC filings

Questions?



Continuing Education

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