



Version 3.0

## List of Enhancements

**Review Summary:**

Previously, the review summary dialog window only displayed the page number and sign-offs. New features added to the Review Summary dialog window include:

- **Bookmark Name Displayed:** The bookmark name for each page is displayed
- **Notes On Page Indicator:** Notes icon displayed for all pages that include a Sticky Note
- **Alerts Notification:** Identify pages that need the attention of another staff member.
- **Change on Page Notification:** Identify pages for which information has changes since the last review. **IMPORTANT:** These color changes to NOT automatically change when information on a page changes. You must manually change the colors to alert another staff member.

The screenshot shows the Review Summary dialog window for a PDF document. The window title is "TTC RS:John\_Smith\_TEST1234\_bookmarked\_Demo\_111911.pdf". It features a "Refresh" button at the top left. Below it, a red arrow points to the "Bookmark Name Displayed" text. The main area contains a table with columns for "Page #", "Bookmark Name", "Alerts", "Change on Page", "Notes", "Author", "Date", "Review Level 1", and "Review Level 2". A red box highlights the "Bookmark Name" column. A red arrow points to a color selection menu (Gray, Red, Blue, Green) over the "Alerts" column. Another red arrow points to a "Notes" icon (a yellow sticky note) in the "Notes" column. A red arrow points to the "Alerts and Change on Page Indicators" text. A red arrow points to the "Notes on Page Indicator" text. A red arrow points to the "Displays when a Stick Note exists on a page" text. The "Delete Sign-Offs" section at the top right has checkboxes for "Preparer", "Review 1", "Review 2", and "All", and a "Delete" button. The "Author Stamp" is "Steve Dusablon" and the "Level" is "Preparer".

**Bookmark Name Displayed**

**Alerts and Change on Page Indicators:**  
Easily call attention to pages that need someones attention or where information has changed. To change the color, either:  
1) Left mouse click to cycle through the colors  
2) Right mouse click to select the color

**Notes on Page Indicator:**  
Displays when a Stick Note exists on a page

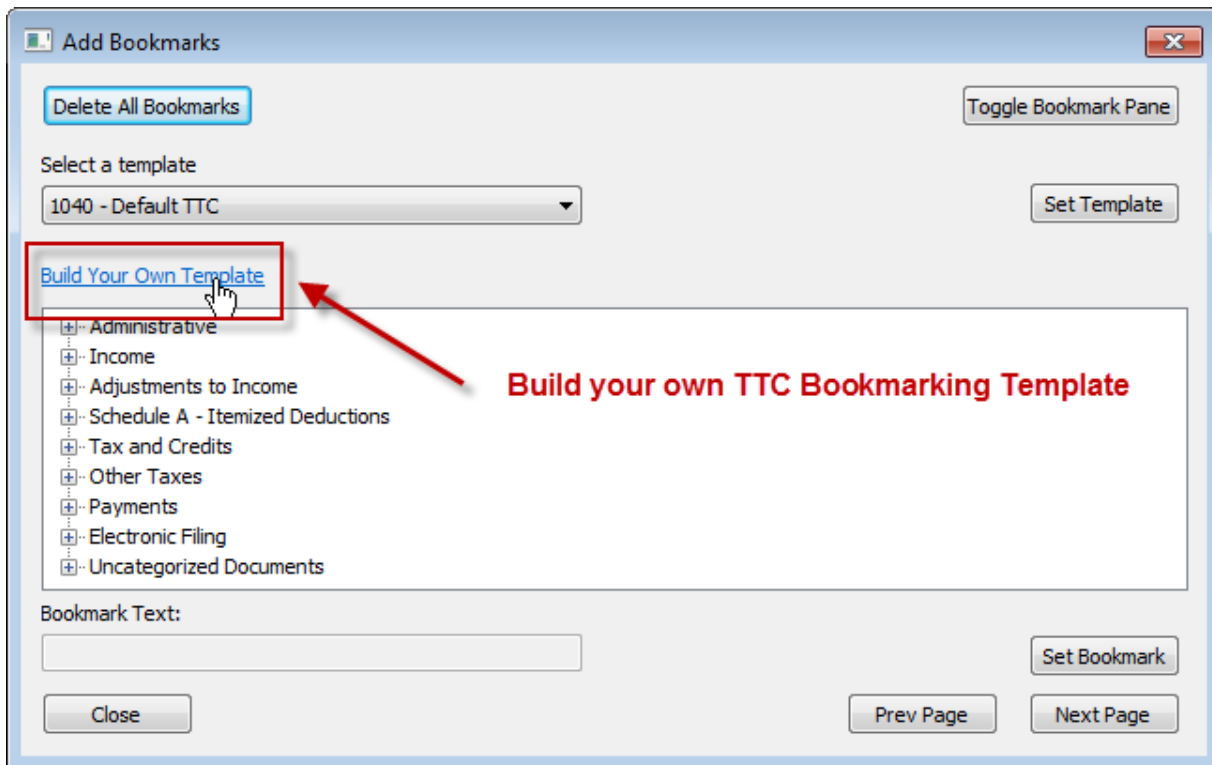
Page #	Bookmark Name	Alerts	Change on Page	Notes	Author	Date	Review Level 1	Review Level 2
1	Summary	⚠	✖		Steve Dusablon	11/19/11		
2	WAGES	⚠	✖		Steve Dusablon	11/19/11		
3	INTEREST INCOME	⚠	✖		Steve Dusablon	11/19/11		
4	CONSOLIDATED 1099'S	⚠	✖		Steve Dusablon	11/19/11		
5	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 2	⚠	✖		Steve Dusablon	11/19/11		
6	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 3	⚠	✖		Steve Dusablon	11/19/11		
7	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 4	⚠	✖		Steve Dusablon	11/19/11		
8	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 5	⚠	✖		Steve Dusablon	11/19/11		
9	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 6	⚠	✖		Steve Dusablon	11/19/11		
10	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 7	⚠	✖		Steve Dusablon	11/19/11		
11	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 8	⚠	✖		Steve Dusablon	11/19/11		
12	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 9	⚠	✖		Steve Dusablon	11/19/11		
13	Merrill Lynch, Pierce, Fenner & Smith Inc Pg 10	⚠	✖		Steve Dusablon	11/19/11		
14	RETIREMENT	⚠	✖		Steve Dusablon	11/19/11		
15	Distributions	⚠	✖		Steve Dusablon	11/19/11		
16	Custom Cabinets	⚠	✖		Steve Dusablon	11/19/11		
17	Custom Cabinets	⚠	✖		Steve Dusablon	11/19/11		
18	Custom Cabinets	⚠	✖		Steve Dusablon	11/19/11		
19	Custom Cabinets	⚠	✖		Steve Dusablon	11/19/11		
20		⚠	✖		Steve Dusablon	11/19/11		
21		⚠	✖		Steve Dusablon	11/19/11		
22		⚠	✖		Steve Dusablon	11/19/11		
23	PARTNERSHIP INCOME	⚠	✖		Steve Dusablon	11/19/11		
24	1065 K1 # 1 Anderson Associates Pg 2	⚠	✖		Steve Dusablon	11/19/11		

## New Tickmarks Added:

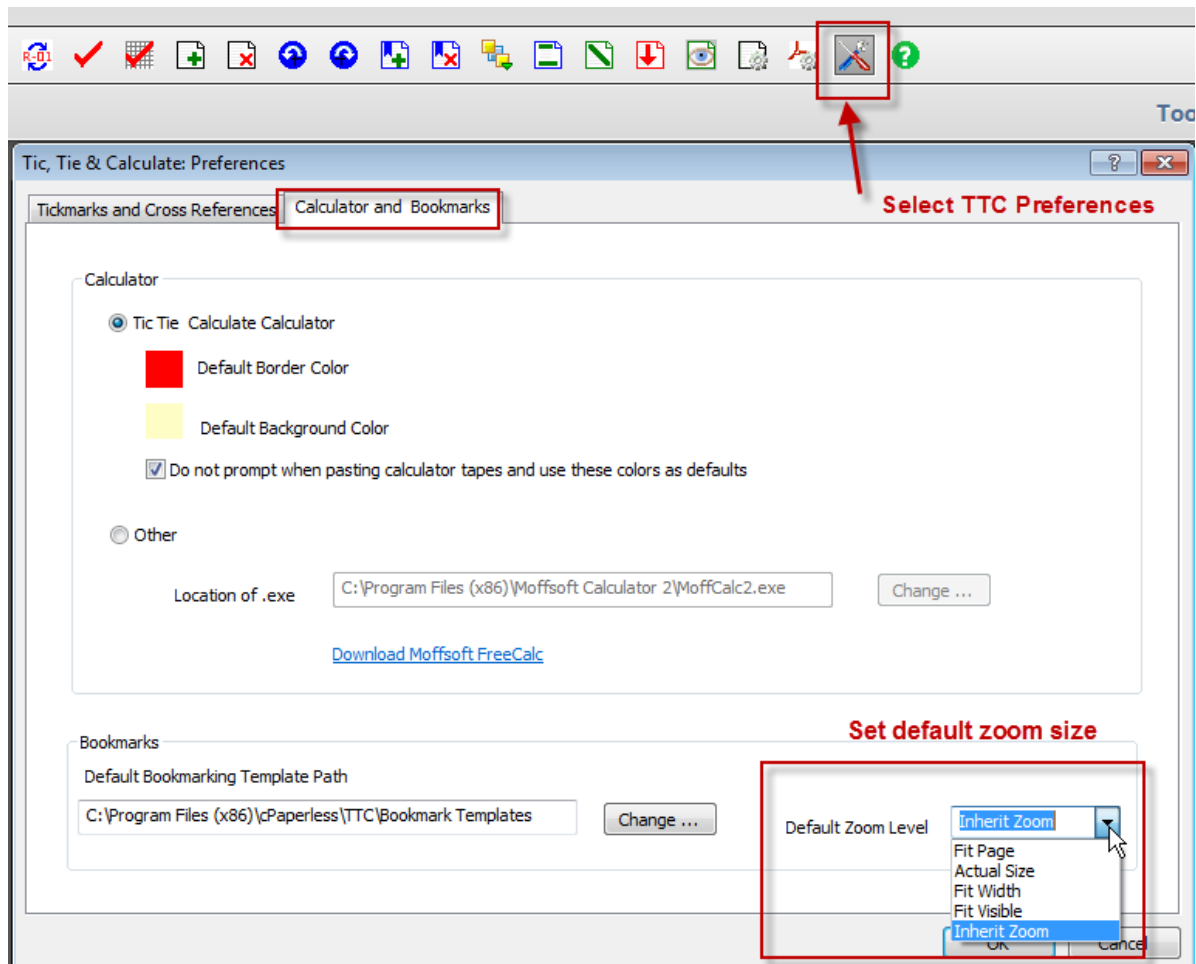
- PYTR = Prior Year Tax Return
- P = Prepared
- R = Reviewed

## Bookmarking and Repagination:

- **Easily Build Your Own Bookmarking Templates:** New web based bookmark template editor allows you to easily modify existing templates or build one from scratch. [Launch Bookmark Editor](#). You can also access the bookmark template builder from the Add Bookmark Dialog Window (as displayed below) or the TTC Support Page at [www.cPaperless.com](http://www.cPaperless.com) -> Support -> Tic, Tie & Calculate Support:

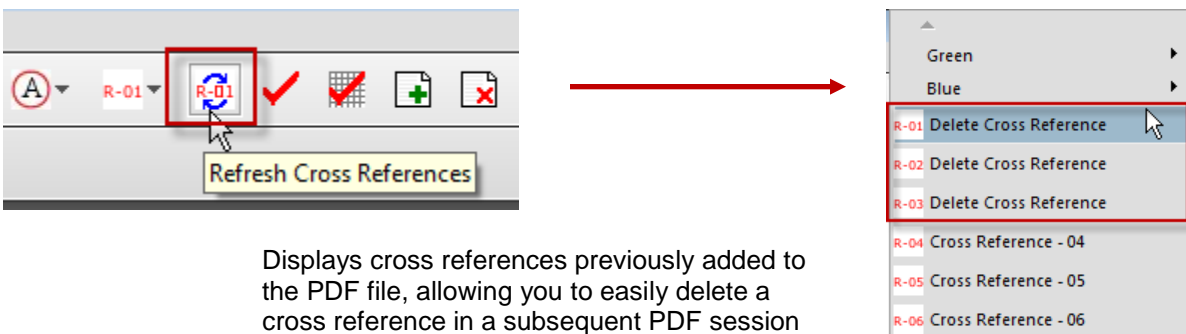


- **New Installed Templates :** Using **scan-and-organize** or **scan-and-populate**? We've updated our standard installed templates to match the bookmarking structure for the following vendors
  - GruntWorx
  - CCH Scan
  - Lacerte Pro Line Tax Import (they might have made some recent changes)
- **Set Default Bookmark Zoom Size:** Set the default zoom size of the page when you select any bookmark created with the TTC bookmarking templates.
  - The default is set to "Inherit Zoom" See screen shot below
  - **IMPORTANT:** This will only work on a go forward basis and for newly created bookmarks that are created with the TTC Bookmarking Templates.



## Hyper Linked Cross References:

- **More Cross References Added:** Includes 60 cross references per color
- **Refresh Cross References:** This toolbar icon refreshes the list of used cross references in the PDF file. You can now easily delete a cross reference in a subsequent PDF session.
  - **IMPORTANT:** Before you delete a cross reference (especially if you have multiple PDF files open simultaneously), select this toolbar icon to refresh the cross reference list in the PDF file you want to delete the cross reference from. Otherwise you might delete a cross reference in the other PDF file.

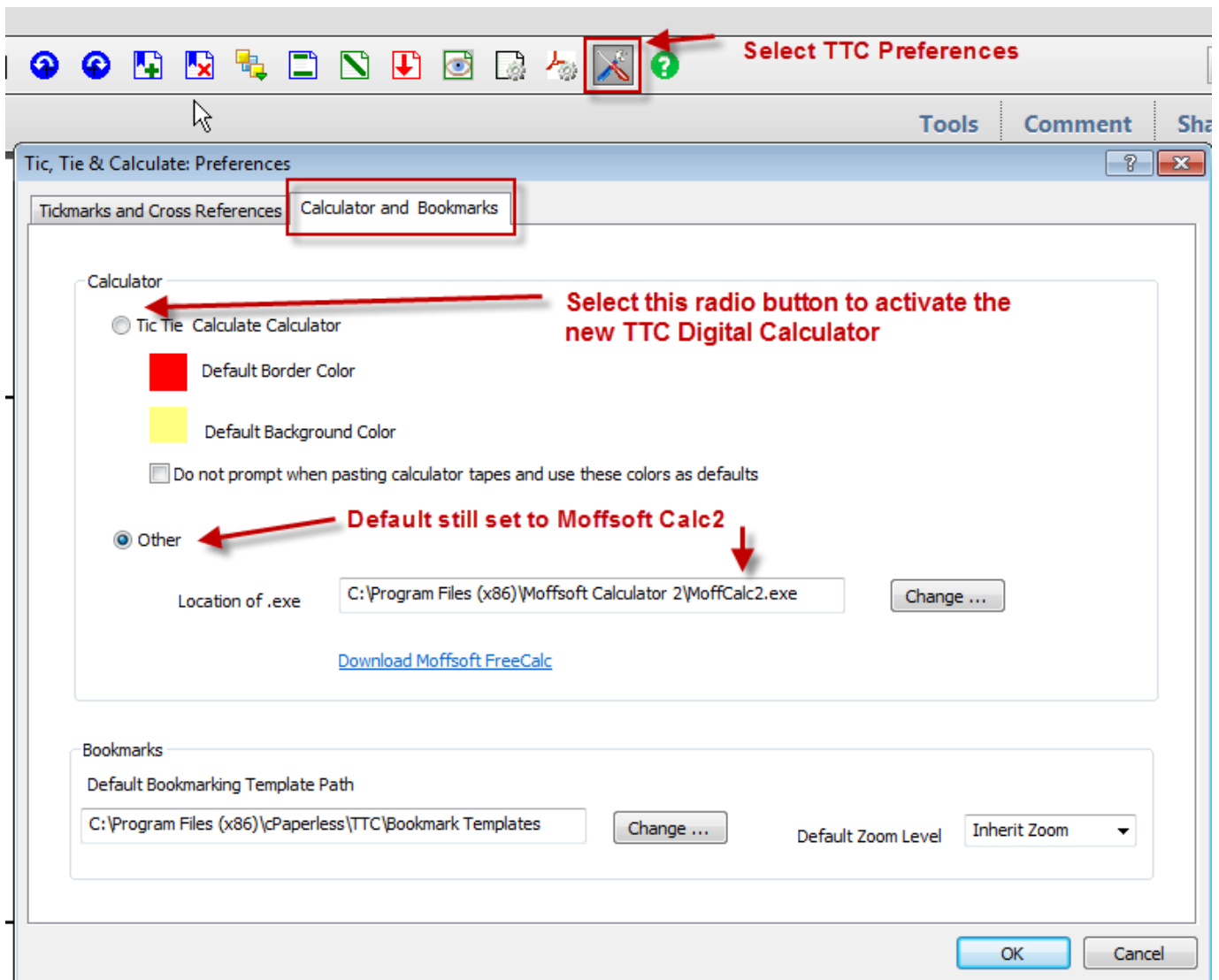


Displays cross references previously added to the PDF file, allowing you to easily delete a cross reference in a subsequent PDF session

## New Digital Calculator:

This V 3.0 release will still launch the Moffsoft Calc2 when you select the Calculator Icon in the TTC toolbar. To use the new TTC Calculator, you will need to specifically select it in the TTC Preferences. If you determine that you prefer the Moffsoft Calc2, you can easily toggle between the two calculators through TTC Preferences.

**DISCLAIMER:** The new TTC Calculator is fully functional; however we're still working through some integration issues with the tape formatting and some other minor calculator operational issues. If you encounter an "Unhandled Exception" error just select Continue and proceed. Feel free to use it now and we encourage you to provide feedback to improve the functionality. Shortcuts have been created, and will be released after we resolve some additional integration issues with Acrobat.



**Travel**

United Airlines      \$    634    ①    Σ    ①

American                    317    ①

Hertz                        119    ①

Avis                         98    ①

**Direct Print to PDF**

**Add a Tape Title**

**Add Comments**

Comment	Amount	Op
1 United	634.00	+
2 American	317.00	+
3 Hertz	119.00	+
4 Avis	98.00	+
Total (4Items)	1,168.00	T

**Travel**

United Airlines      \$    634    ①    Σ    ①

American                    317    ①

Hertz                        119    ①

Avis                         98    ①

**Miss a number or need to remove one?**

**Add or delete rows to modify an existing tape. Works like a mini Excel file.**

Comment	Amount	Op
1	634.00	+
2	317.00	+
3	119.00	+
Total (3Items)	1,070.00	T