



# Additional OPTO Navigation Features

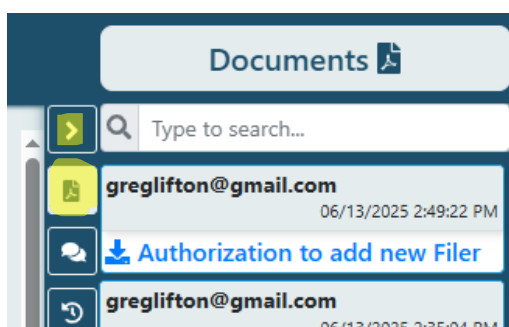
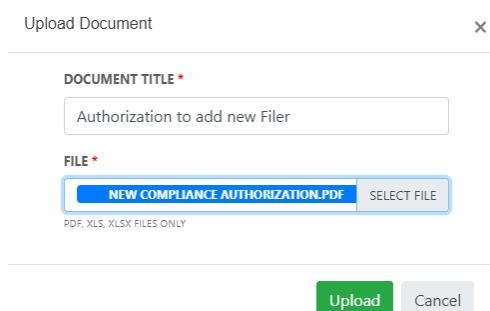
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## Right-hand Side Panel

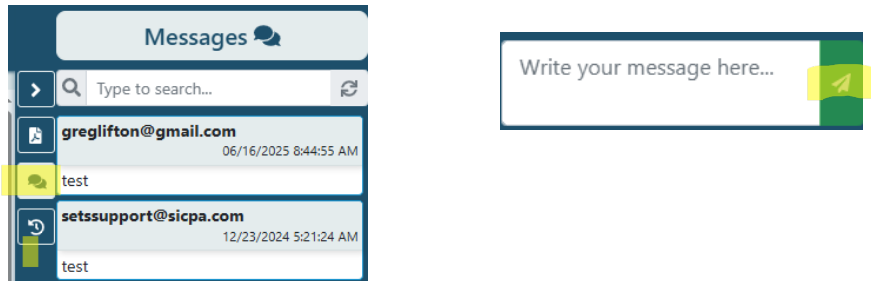
The right-hand side panel appears on your homepage. It has a search bar that allows you to search the entries under each of the following functions. Next to the search bar is a ‘carrot’ , that allows you to close the panel for better viewing on a smaller screen.

**Documents** – click on this icon  and then click on the blue Add New Document button at the bottom of the column to open the Upload Document form. The Document Title will appear as a hyperlink for viewing in the list. The system accepts PDF, Word, or Excel documents.

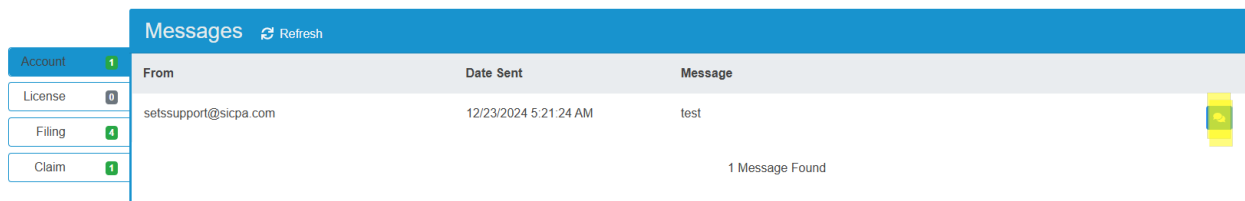
The same side panel features appear after you open a return. For some license types, documents are required to be attached inside the return before the system can recognize them, rather than at the account level. For example, the Q4 return for a DS license requires that a TTB report is attached to the return if the SWE is claimed.


**Messages** – click on this icon  and type a message or question in the box at the bottom of the column and click the green arrow. Your message will appear on the OLCC dashboard for further action or response. The feature is provided as an alternative to email.

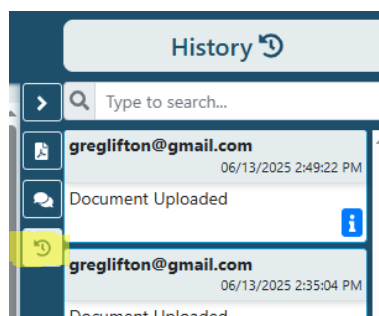


Similarly, messages typed into the system from OLCC will appear on your dashboard. To read the message, click on the blue message bubble and the system will navigate to the related page. Click on the blue text to open the message.

For example, a rejected amendment requires an OLCC response. Clicking on the bubble will open the amended return and show the message in the side panel.



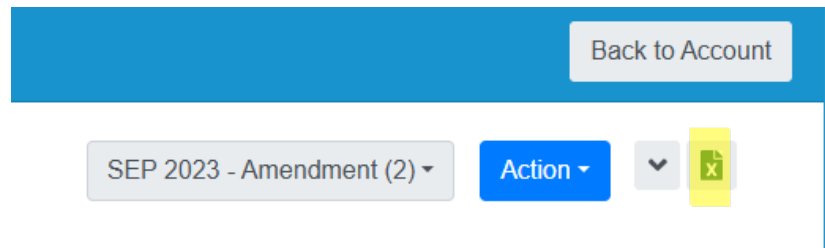
**History** – click on this icon  to view a history of the user and type of entry made in the account. The feature is available on any page that shows the side panel, and will change, for example, when opening the License Detail page or when opening a return.



## Excel downloads

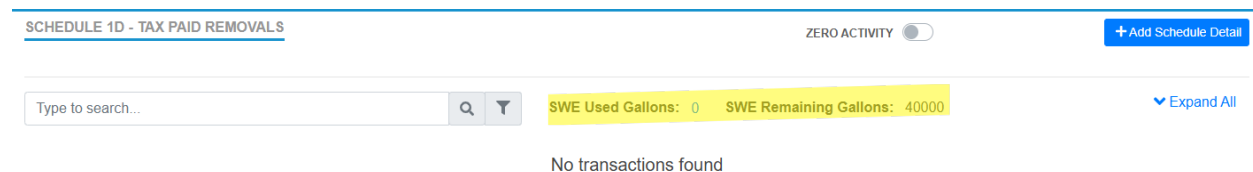
Open a return, and at the top right there is an Excel icon. Click it to export your return details into Excel format. You may then save the file for your own records. It will show the schedule entries you made in columns and rows.

This feature is not available for the DS, DTR, and OWB returns.



## SWE Tracker

Wineries filing as a TTB producer will notice a new feature that tracks the volume of wine they have claimed for the small winery exemption throughout the year.



In the example above, schedule 1D – Tax Paid Removals shows that this licensee has not claimed any SWE on their year-to-date filings. The remaining gallons are the total allowable exemption for wineries that produce under 100,000 gallons annually.

When an entry is made for more than the allowable amount, an error message will appear, and you will be unable to submit the return. Please adjust your entry so that the SWE does not exceed the allowable volume.