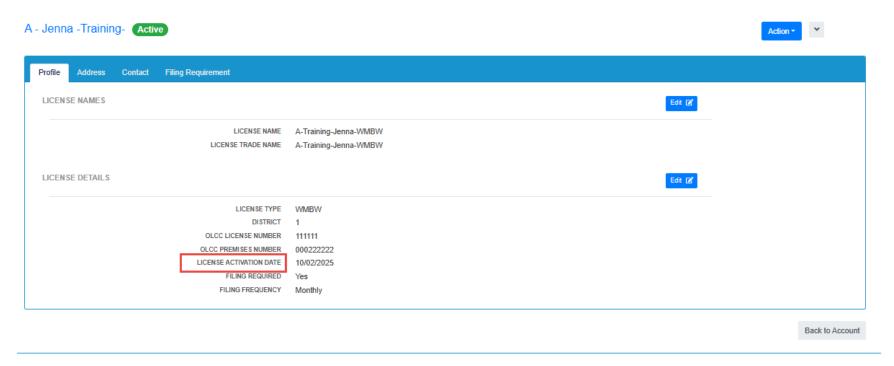
OPTO RELEASE 7.3

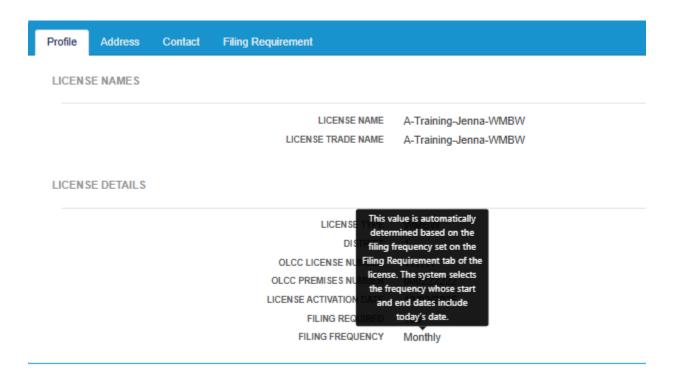
Changes Visible to Filers

License Changes

When viewing a license, users will be able to see a new field "License Activation Date". This field is only editable by state users and is for informational purposes. It does not determine their filing requirement.



When hovering over the Filing Frequency value, filer users will be able to see the below message.

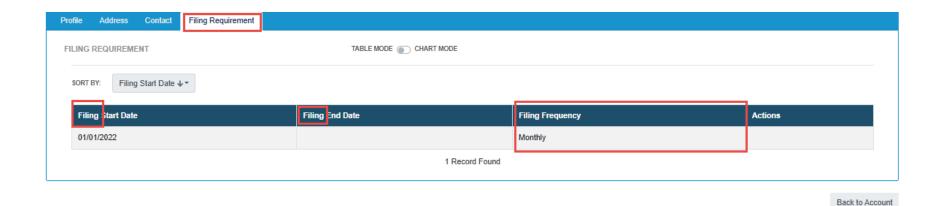


The "Dates" tab was renamed to "Filing Requirement".

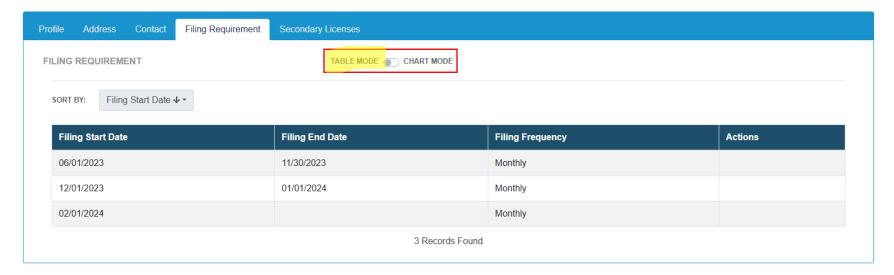
The "Start Date" and "End Date" columns were renamed to "Filing Start Date" and "Filing End Date".

A new column "Filing Frequency" was added.

This table will show when a filer is required to file a return and what type of return (Annual, Monthly, Quarterly).



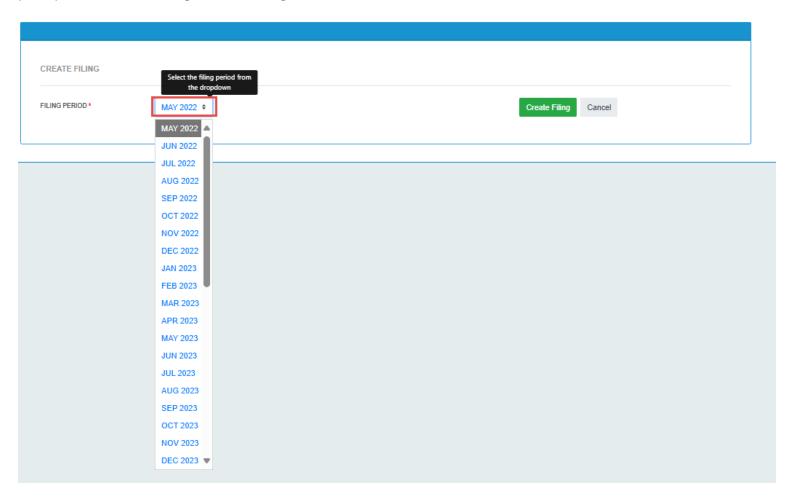
When accessing the Filing Requirement tab, the user will now, by default, see the table mode layout.



Back to Account

Filing Changes

Currently, when a user creates a filing, the filing period drop-down defaults to the current period. Going forward, the dropdown will default to the period that has not been created. Users retain the option to select a different filing; however, they will be prompted to submit filings in chronological order.



Switching Between Monthly and Annual Frequency

Before Release 7.3, effective 10/24/2025, the system did not transfer ending inventories from annual returns to serve as beginning inventories for monthly returns when switching from annual to monthly reporting.

Moving forward, when transitioning between annual and monthly reporting periods, the system will transfer ending inventories from the annual return to serve as beginning inventories for the monthly return.

Note: BI values are carried over only if the filing is created after the last filing reaches complete status. If created earlier, users must manually enter BI values or delete the in-process filing to start over and carry forward completed values.

Before Release 7.3, effective 10/24/2025, credits from monthly and annual filings couldn't be used to pay for invoices interchangeably. Now, users can apply credits from either filing frequency to pay for the other.

Credit Management Changes

After the deactivation of a license, the system will now allow users to access and use the credit management of the inactive license.

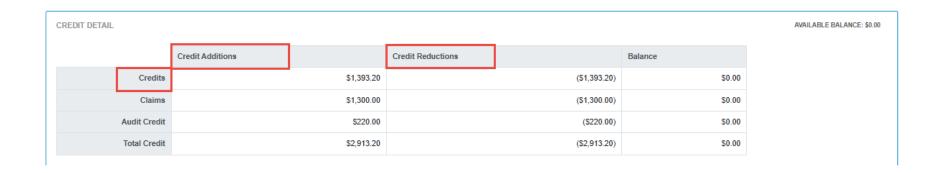
In credit management, the filer user will see the redesigned credit detail summary section.

"Other Credits" was renamed to "Credits".

"Original" was split into two sections "Credit Additions" and "Credit Reductions".

"Credit Additions" will represent all positive entries into credit management.

"Credit Reductions" will represent all negative entries into credit management



Invoice Changes

From the invoice page, Users will now be able to Go to Credit Management from the invoice page using the "Go to Credit Management" button.

