



LACERTE

START-UP GUIDE

Thank you for joining us!

Welcome to SAM Technology! We're excited to have you on-board as we change the way Tax Professionals do business forever.

This guide will help you with the integration of your Lacerte tax software and the SAM platform and will break down key areas to take note of. If you have any questions, don't hesitate to reach out to info@mysamadmin.com.

Thank you again for joining us and we look forward to a successful tax season!

Before your begin:

**Please have your local e-mail program open. (Outlook, Mail, etc.)
Web based e-mail browsers will not work.**

If you are working on a cloud based desktop, the e-mail client must be local to that cloud desktop.

We also recommend creating a folder on your desktop to place client files into.

If your firm uses an E-Organizer, please disable that function before continuing.

Please Continue to the Next Page

**If you have any issues or questions, please e-mail
info@mysamadmin.com**

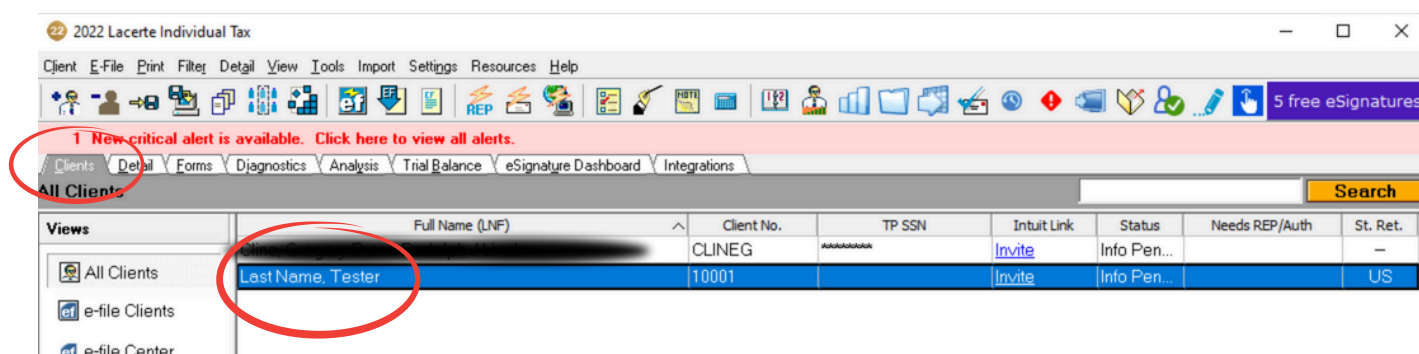


Lacerte Integration Instructions

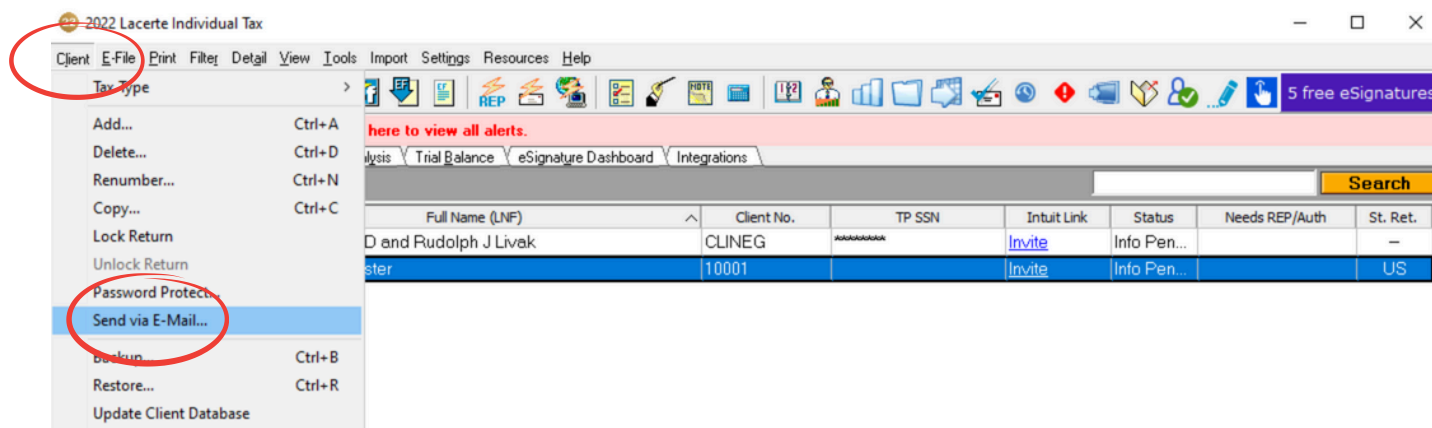
Backing Up (E-mail Option)

1) Log in with your Intuit Credentials into your Lacerte Software

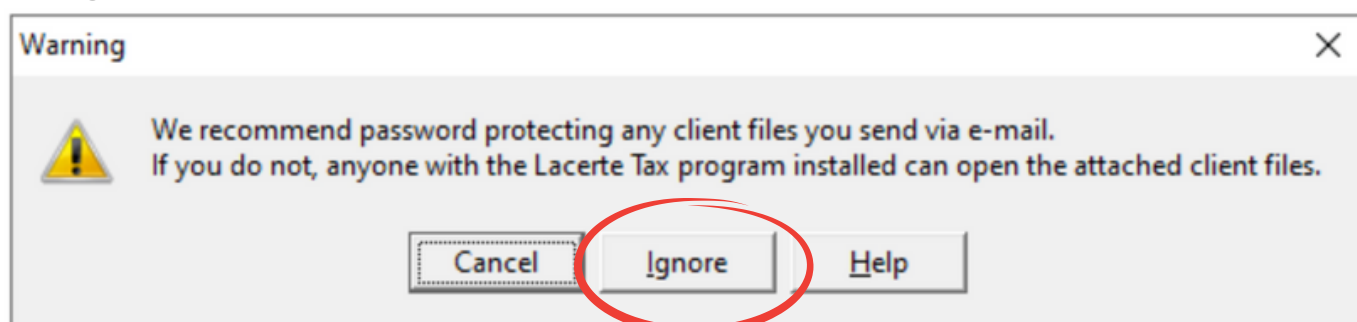
2) On the Client's Tab, Highlight the Client's Name



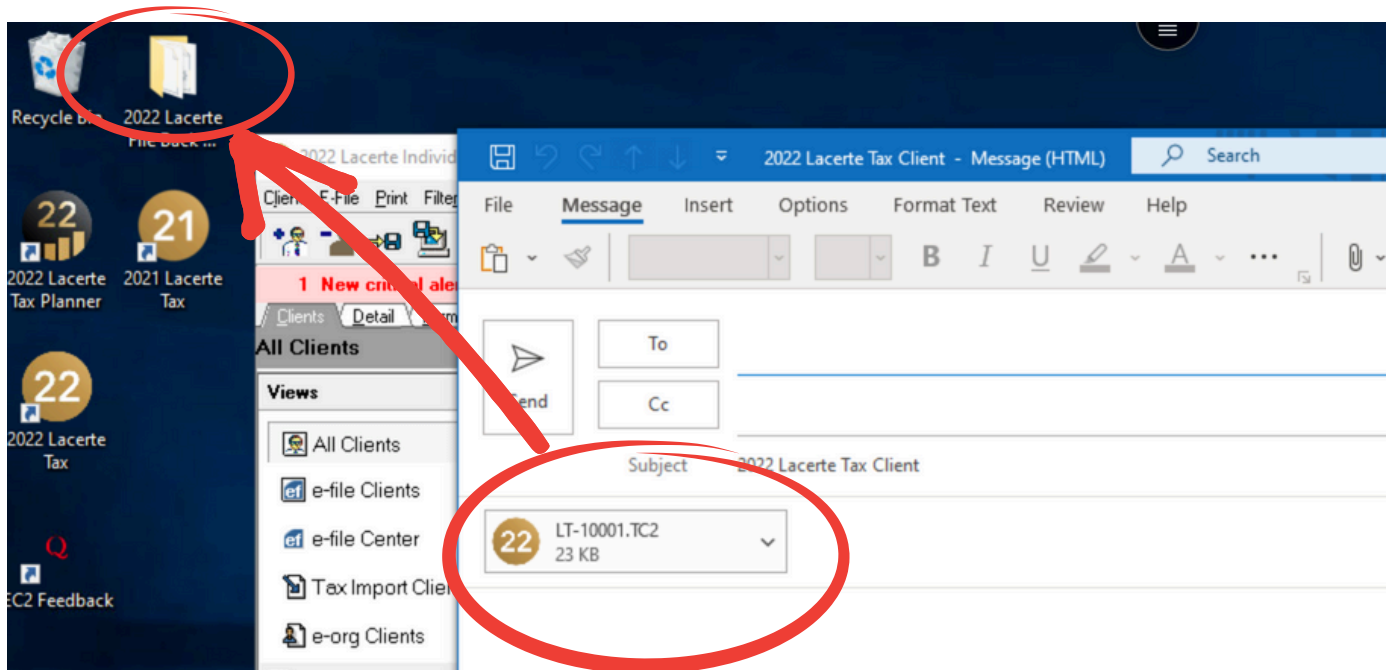
3) Click "Client" on Toolbar, then "Send Via E-mail".



4) If a pop-up regarding setting a password appears, click "Ignore".



5) A new e-mail draft will open, click and drag the file to your desktop or any folder of your choice.



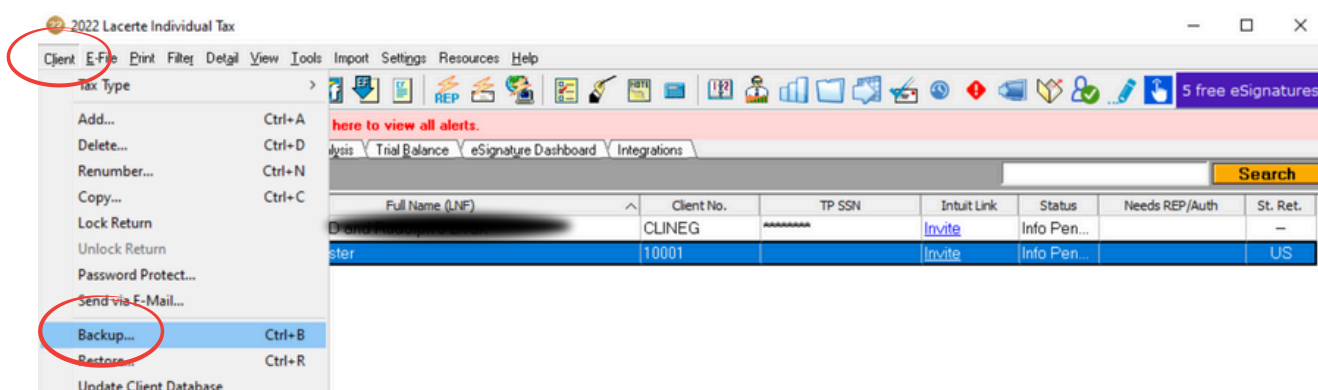
6) Close the e-mail window. You may now create a Ticket on the SAM Marketplace and upload the file to your Ticket.

TIP: When uploading onto SAM Marketplace, be sure the proper tax software is selected

Backing Up (Zip File Option)

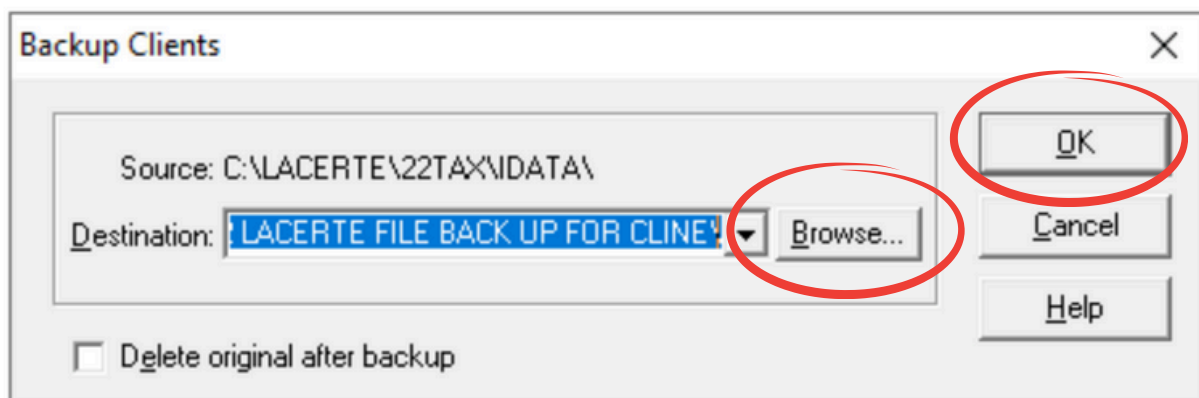
If your computer is not equipped with a local e-mail program, you may use the "Zip File Option" as a workaround.

- 1) Log in with your Intuit Credentials into your Lacerte Software
- 2) Click on the Client, then click "Client" on the Toolbar, then click "Backup".

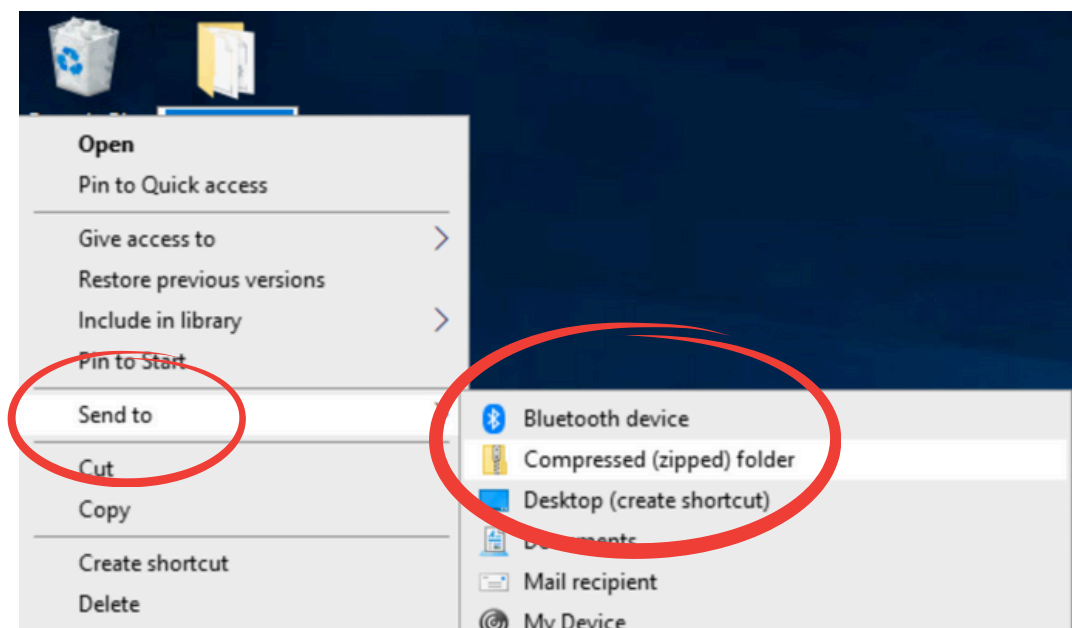


3) A pop-up will appear and ask for a target location. Click "Browse" to select the folder that you created for the client. Click the folder of choice and click "Ok". Then click "Ok" on this window.

Keep in mind, backing up this way requires clients to be in individual folders.



4) Locate the folder you saved the files to. Right-Click the folder, then "Sent to", then click "Compressed (zipped) folder".



5) You may now create a Ticket on the SAM Marketplace and upload the file to your Ticket.

TIP: When uploading onto SAM Marketplace, be sure the proper tax software is selected

Restoring After a Submission

1) Log in with your Intuit Credentials into your Lacerte Software

2) Next, on the SAM Marketplace, go to the "Review" Screen. Click "View Ticket".

CREATE
TICKET

TICKET
STAGING
0

IN POOL
1

PREPARING
0

REVIEW
2

COMPLETED
0

MY WALLET
\$9,776

TICKETS IN REVIEW

TICKET #	CLIENT NAME	FILING TYPE	DATE STARTED	TAX FEE	PREP TIME	TIME IN REVIEW	PREPARER	TAX FILE STATUS	
682	TEST	1040	2/17/2023	\$50	0 MINS	3 MINS	ALEX MESCHI	ADMIN REVIEW	VIEW TICKET

2) Click the file under "SAM Produced File" Column.

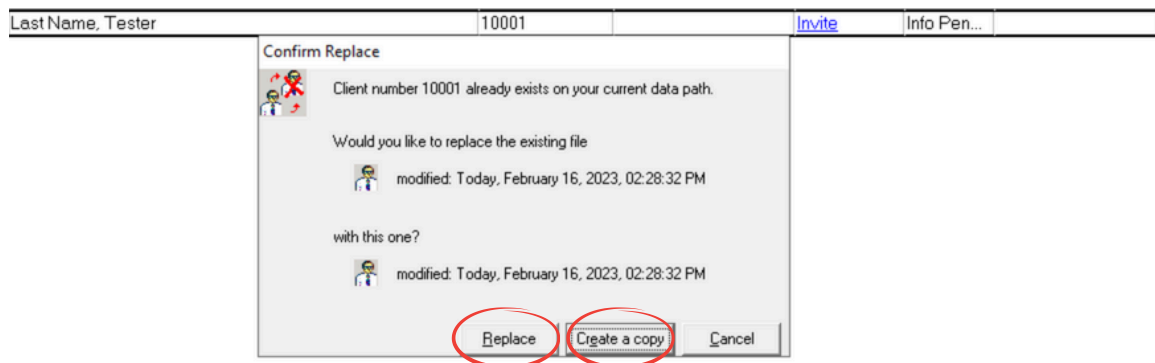
- The File will download to your browser.

CREATE TICKET	TICKET STAGING 11	IN POOL 19	PREPARING 3	REVIEW 50	COMPLETED 32	MY WALLET \$2,776	
Ticket #690 Client: Lacerte Output Filing Type: 1040 \$105 Firm Discount: \$5 Ticket Selections • 2022 • Form 1040 • Married • Has W2s • Owns a Home • Lacerte File Source Documents • Tax File (LT-POWEL65.TC1) Missing Documents • No Info Missing Client Industry (Optional) • None A Tax specialty is required for the ticket (Optional) • None Notes to Preparer No notes available Notes From Preparer Preparer has not sent any notes to firm Carryforwards • No carryovers specified • No carryforwards specified Tax Saving Ideas None entered SAM Produced Files/Documents • Tax software password: ackOQW • Output tax software file: (LT-POWEL65.TC1) - 2/22/2023 • Tax Return PDF: Lacerte Output 2022 Tax Return: - 2/22/2023							

When you receive your file back from SAM, it will be password protected.
The password can be found on your TICKET on the SAM Marketplace.

3) Open the file, Lacerte will popup and ask if you'd like to "Replace" or "Create a copy".

If you would like to review the file first, click "Create a copy". After reviewing, be sure to delete the duplicate and click the downloaded file again, selecting "Replace" this time.



4) Now in Lacerte, double click the client.

The first time you access the client's file with the new SAM Produced File, Lacerte will prompt for a password.

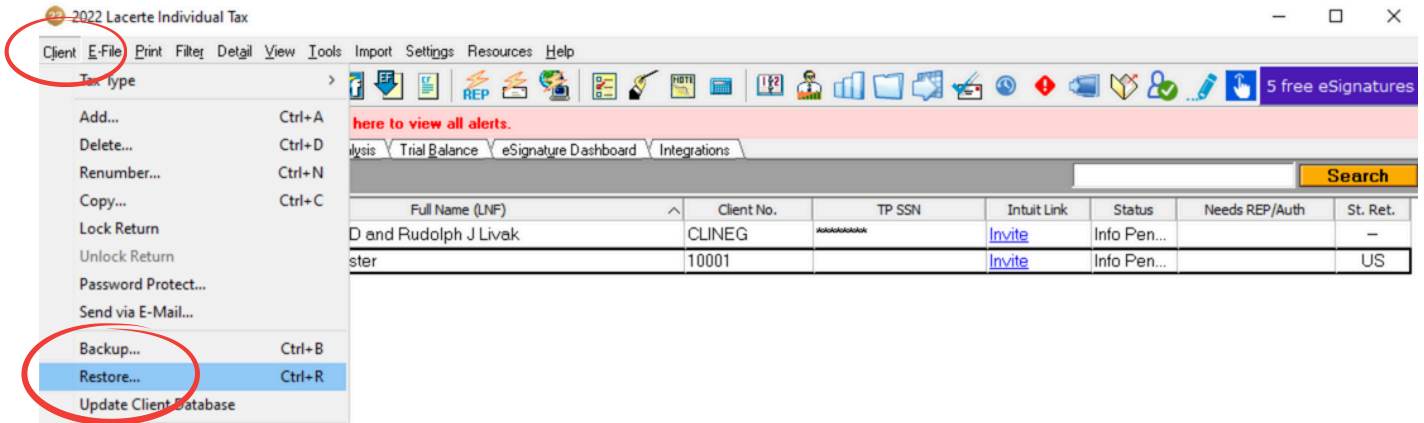
Enter the password found on your SAM Marketplace Ticket near the SAM Produced File. See previous page for example.

If you would like to edit and/or remove the password, please turn to the last page of this manual.

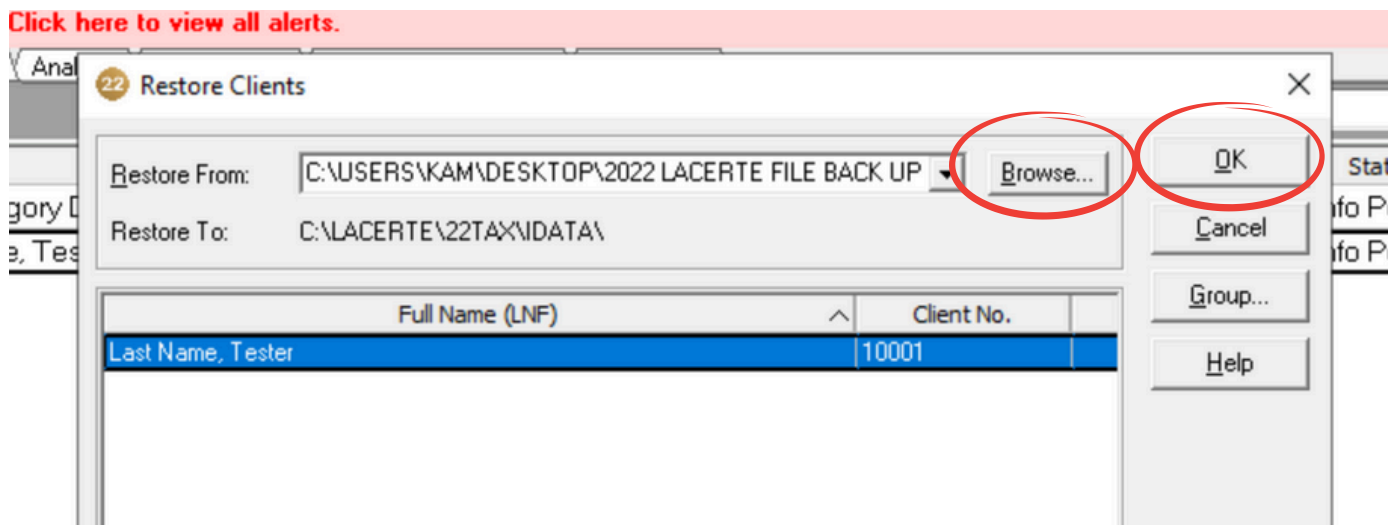
You will now be able to view the Updated Client's Tax File in Lacerte as normal.

Restoring After a Submission (Alternate)

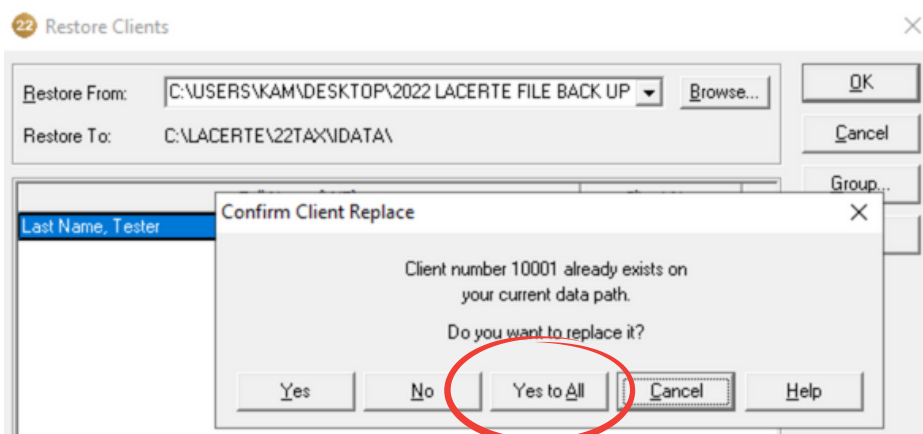
1) With Lacerte open, and the SAM Produced File Saved to a folder, click "Client", then "Restore".



2) Click "Browse" to find the location that you saved the SAM Produced File to. Next, select the client name in the window. Then click "Ok".



3) A window will pop up, asking to replace the files. Click "Yes to All".

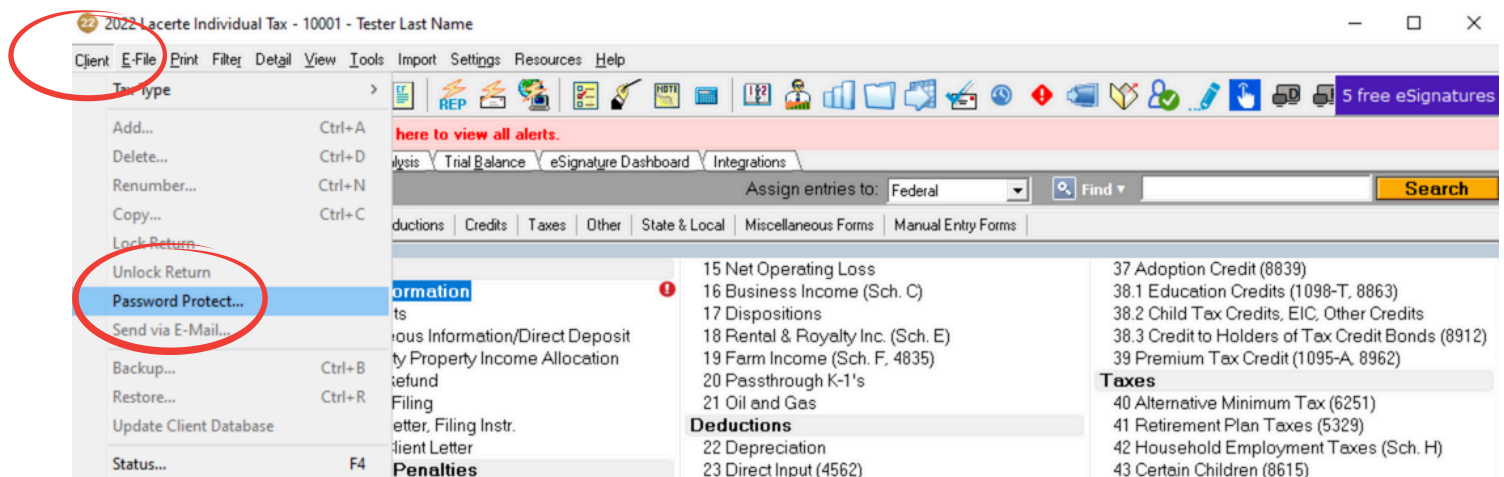


The first time you access the updated customer file, you will be asked for a password. The Password can be found on your SAM Ticket.

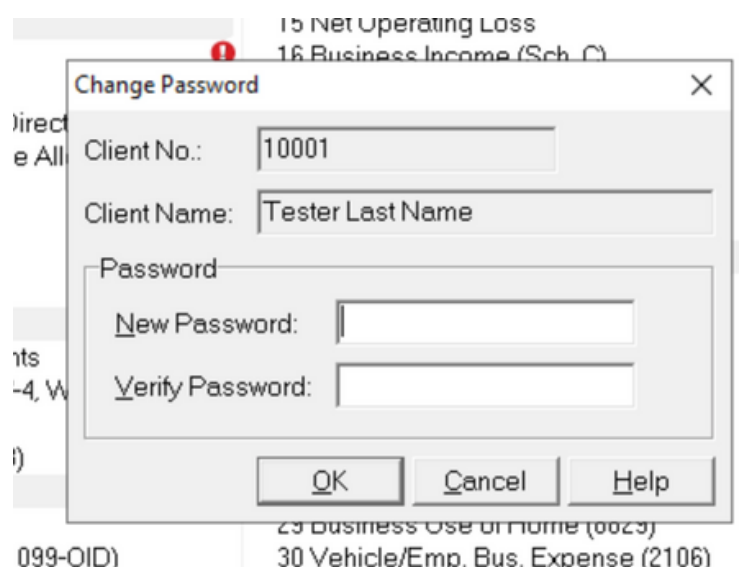
You will now be able to view the Updated Client's Tax File in Lacerte as normal.

Adding or Editing a Password

- 1) With Lacerte open, double click the client you wish to add or edit a password for. The screen will change to Details
- 2) Now click "Client" on the toolbar, then "Password Protect".



- 3) A window will popup. If you'd like to NOT set a password, leave the new password fields blank after entering the current password.



If you have any issues or questions,
please e-mail info@mysamadmin.com