



ULTRATAX

START-UP GUIDE

SAM TECHNOLOGY

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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 UltraTax 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!



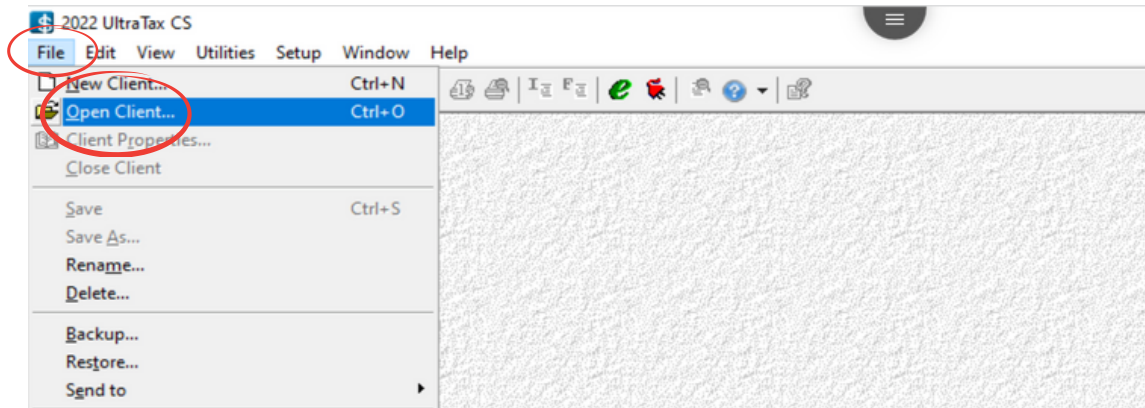
Please Continue to the Next Page

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

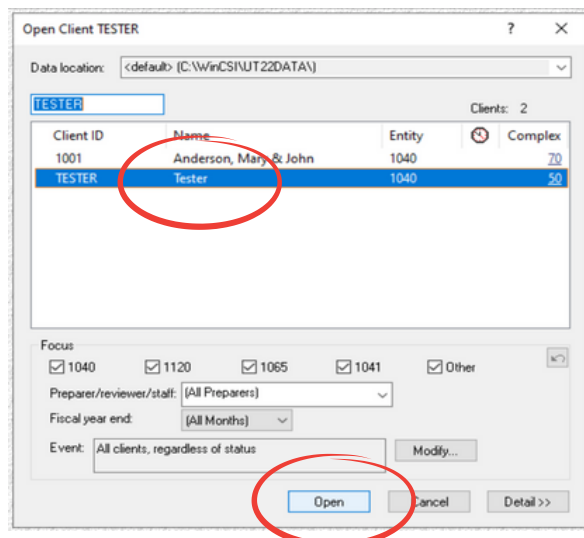
UltraTax Integration Instructions

Backing Up

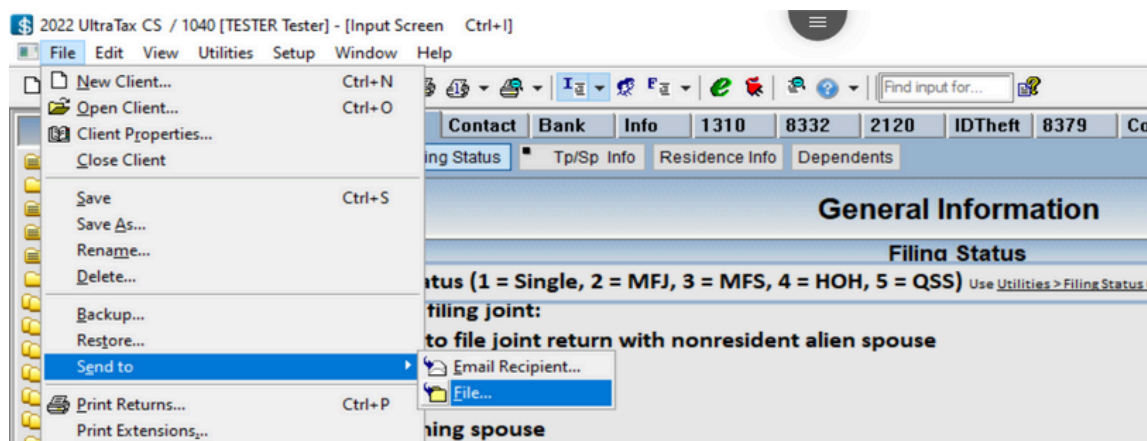
- 1) Log in with your UltraTax Credentials into your software.
- 2) Click "File", then "Open Client".



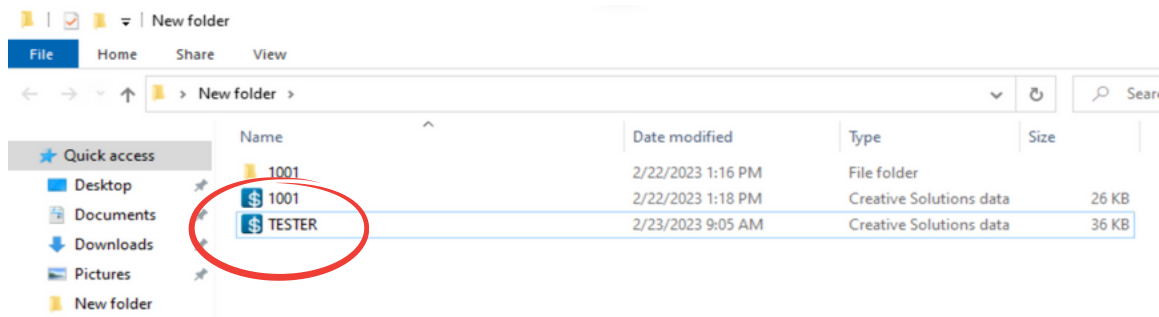
- 3) Select the client and click "Open".



- 4) The client's file will open. Now click "File", then "Sent to", then "File".



5) After the file is saved to your desktop/folder, it should look like below. Upload the .csd file to the SAM Marketplace.



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

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Restoring After a Submission

- 1) Log in with your UltraTax Credentials into your UltraTax Software
- 2) Next, on the SAM Marketplace, go to the "Review" Screen. Click "View Ticket".

CREATE TICKET	TICKET STAGING 11	IN POOL 19	PREPARING 4	REVIEW 51	COMPLETED 33	MY WALLET \$2,523			
TICKETS IN REVIEW									
TICKET #	CLIENT NAME	FILING TYPE	DATE STARTED	TAX FEE	PREP TIME	TIME IN REVIEW	PREPARER	TAX FILE STATUS	
694	ULTRA TAX OUTPUT	1040	2/23/2023	\$105	0 MINS	1 HRS, 8 MINS	BETA PREPARER	READY TO REVIEW	VIEW TICKET

- 2) Click the file under "SAM Produced File" Column.
 - The File will download to your browser or location of your choice.

Ticket #694

Client: Ultra Tax Output

Filing Type: 1040

\$105

Firm Discount: \$5

Ticket Selections

- 2022
- Form 1040
- Married
- Has W2s
- Owns a Home
- [Ultra Tax File](#)

Source Documents

- [Tax File \(1001.csd\)](#)

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

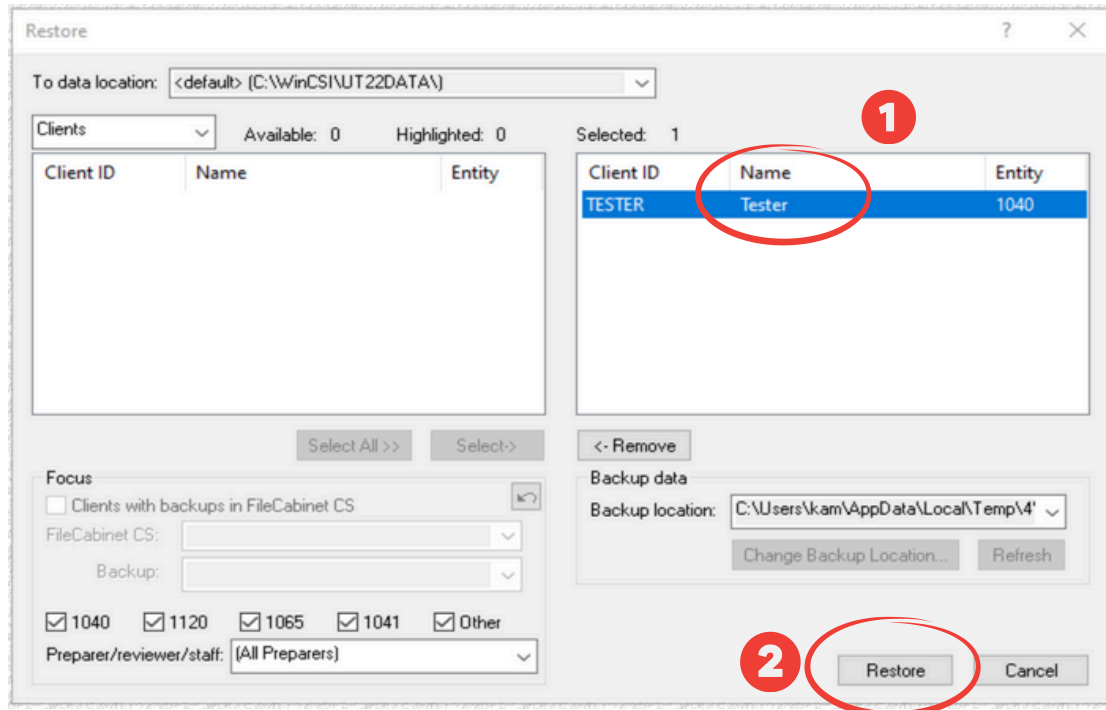
None entered

SAM Produced Files/Documents

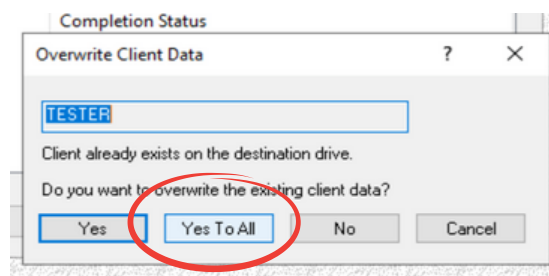
- Tax software password: jzodu1
- [Output tax software file: \(1001.csd\) - 2/23/2023](#)
- [Tax Return PDF: Ultra Tax Output 2022 Tax Return: - 2/23/2023](#)

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) With UltraTax running, double click the downloaded SAM Produced File. A window will pop up. Verify the correct client is selected and click "Restore".



4) A new window will popup asking if you'd like to replace the file. 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.

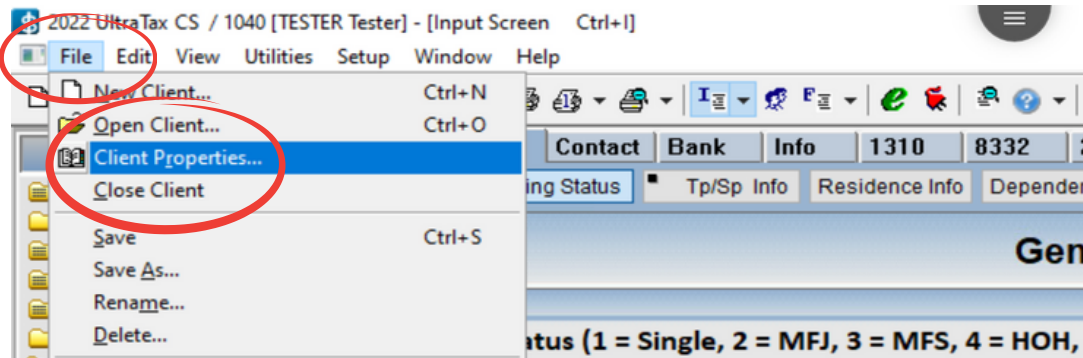


You may now view your Client's File in UltraTax as normal.

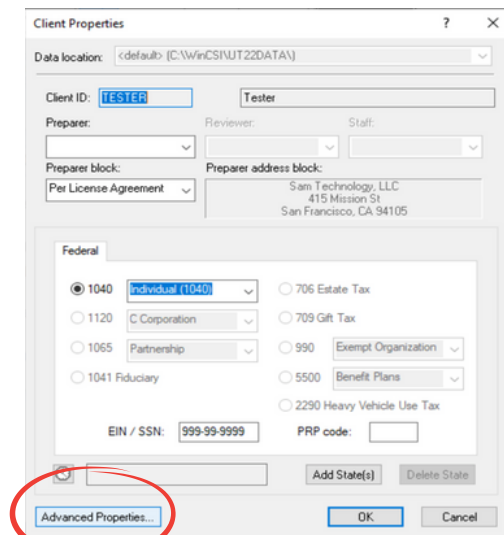
Adding or Editing a Password

1) Select and open the Client's file that you'd like to add or edit the password for.

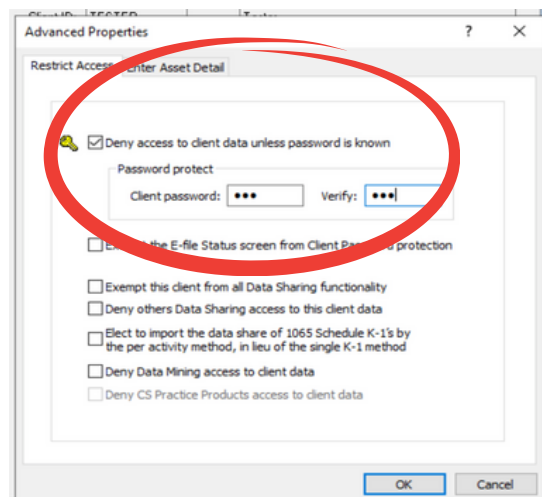
2) Now click "File", then "Client Properties".



3) A window will popup. Click "Advanced Properties".



3) If you would like to have a password, check the first box at the top and enter your password. If you would like to remove a password, uncheck the box and leave the password fields blank.



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