



2018 ULTRATAX CS, v.2018.3.0 User Bulletin UT-18.3.0: Update

January 31, 2019

This user bulletin describes program changes affecting UltraTax CS Platform.

CHANGES

Authentication after applying update(s)

With this release, UltraTax CS will automatically reauthenticate when UltraTax CS restarts after applying software updates. Prior to this release, it was required to manually reauthenticate when UltraTax CS restarted after applying software updates.

Web organizer retrieval to GoFileRoom

With this release, UltraTax CS will automatically store an image of the web organizer into the client's GoFileRoom directory (if licensed) when the organizer is retrieved. If the web organizer has file attachments, the attachments will also be stored into GoFileRoom (if licensed). Prior to this release, UltraTax CS did not save off an image of the client's web organizer to GoFileRoom (if licensed) and only prompted to save off any file attachments to another location.

1040 Client Organizer Federal Asset Report SSN masking

With this release, the SSN located in the header section of the 1040 Client Organizer Federal Asset Report will now be masked when the *Mask SSNs, driver's license and state issued ID numbers with asterisks* checkbox is marked within the Other return options group box of the Setup > 1040 Individual > Organizer tab. Prior to this release, the SSN within the 1040 Client Organizer Federal Asset Report was not being masked when the option above was marked.

Qualified business property – memo assets

With this release, memo assets will no longer be included as a qualified asset on the Qualified Property report.

Massachusetts Personal property exchange

With this release, Massachusetts section 1245 assets can be disposed of as a like-kind exchange when an asset is disposed of using the method Sold/Scrapped for tax purposes for 1040 individual returns.

DATA MINING

General

With this release, Data Mining can be accessed by choosing Data Mining from the Utilities menu. Data Mining is a versatile tool that enables you to search your UltraTax CS product databases for clients with specific characteristics. Using Data Mining, you can identify your client's tax accounting needs, pinpoint tax savings opportunities, and target your client communications effectively.

Searches and search criteria

Data Mining is installed with predefined searches and search criteria so you can easily start searching for clients that have specific characteristics. You can also add custom searches and search criteria to filter clients based on the characteristics you choose.

For more information, see ["Building Data Mining searches"](#) in the Help & How-To Center.

Search examples


To access Data Mining examples of searches that can be performed, select the UltraTax CS Home Page, click the Product Information link, select the Platform tab, and then click the Data Mining Examples link under Platform guides.

For more information, see ["Data Mining Examples"](#) in the Help & How-To Center.

eSignature

Data Mining enables you to assemble Engagement letters for your clients to electronically sign for the 1040, 1120, 1065, 1041, 990, 706, and 709 entities. eSignature documents can be generated by marking the *Web / eSignature: Thomson Reuters data center* radio button under Electronic Delivery in Step 3 of Data Mining. The eSignature documents from Data Mining will be sent to CS Connect where they can be selected for transmission to the Thomson Reuters data center.

To send eSignature documents generated through Data Mining:

1. Open CS Connect from **Utilities > CS Connect** or by using the icon from the UltraTax CS toolbar .
2. Select the *(\$)* **Transmit Data Mining eSignature documents** option.
3. Select the *Web Data Mining* tab at the top of the CS Connect dialog.
4. Highlight the appropriate client(s).
5. Click the **Select** button to move the highlighted clients to the *Clients selected* pane.
6. Click **Connect** to transmit the eSignature documents generated from Data Mining to the Thomson Reuters data center.

For more information, see ["Assembling eSignature documents via Data Mining"](#) in the Help & How-To Center.