Lacerte's 27 Time-Saving Features

Lacerte tax software includes 27 built-in tools designed to save you time in your workflow. These tools are Included FREE in all unlimited versions of Lacerte tax software.

	Time Saving Feature	What it does	How to use it	Online Resource
1	Audit Checks	Keeps track of what data fields have been audited or reviewed	Open the form you want to audit. Click the box of the value that has been verified and to display a green check.	http://www.youtube.com/watch?v=Muv0pqFzG2s
2	Batch File Extensions	Allows you to e-file multiple extensions at once	Click on the Clients tab Highlight the client files to e-file by holding down CTRL and clicking each client or click F3 to select them all. Click on E-File Click on Start E-file Extension Wizard	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN53891
3	E-file Resource Center	Allows you to quickly e-file returns and extensions, track the progress of returns e-filed, and generate reports.	Click E-File on the top menu bar.	http://accountants.intuit.com/tax/lacerte/resources/efile-resource-center.jsp
4	e-Organizer	Helps you get the information you'll need from your clients to prepare their returns (e.g. itemized deductions).	Go to the Tools menu, select Organizer.	http://www.youtube.com/watch?v=-7NACjl2lmQ
5	Estimates	Automatically generates and prints estimated payments for clients based on specific inputs from the client (e.g. how much they want to pay and when).	Go to Screen 12, Estimates (1041-ES)	http://www.youtube.com/watch?v=0F8wTg5niFc

6	Export Billing	Automatically generates client invoices in Quickbooks for services rendered by using information stored in your Lacerte Tax Software.	Under the Tools menu select Import/Export Data, then select Export Billing Information to QuickBooks	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN49571
7	Export Depreciation	Exports the depreciation data for a client into a comma separated file (.CSV) for use in other applications.	1. Highlight the client(s) file containing the depreciation data to be exported. 2. Click the Client menu and select Export, then Export Depreciation to File.	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN50320
8	Family Link	Automatically populates client data on form 8615 based on the parent's income. This is sometimes referred to as the Kiddie Tax.	1. Complete the parent's and child's returns. 2. Go to the Tools menu and select Family Link (8615).	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN48117
9	Form Status Notification Tool	Provides the most up-to-date status of tax forms for use in Lacerte. Use this tool to find historical Lacerte release time frames for those forms that have yet to be approved by Federal and/or State taxing agencies, or the actual Lacerte web download date for those forms that have been approved.	1. Go to http://lfs.intuit.com and Log into My Account as you normally would. 2. Select the Federal or State agency 3. Select the Module 4. Scroll through the list of Forms to view the Current Status	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN59391
10	Fixed Asset Import Tool	Allows you to import fixed assets from an Excel Spreadsheet (.xls file). Best used for new clients or existing clients with several asset purchases in a given year.	1. Go to the detail screen for the client you want to import 2. Go to Screen 21 (Depreciation) 3. Click the Fixed Asset Import button (about a third of the way down in the depreciation screen)	http://www.youtube.com/watch?v=pDuDuQ3vUVw

11	Input Warnings for E-File	Triggers a critical diagnostic when input is missing, incomplete or present that would likely result in the e-filed return being rejected by the agency.	1. Mouse over the error indicator (appears as a red and white exclamation mark) 2. In the text box that appears, click the link to go to the input field generating the error 3. Correct the error and click the Clients or Forms tab 4. The critical diagnostic will disappear	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=INF16436
12	Jump to Input	Allows you to go from a line on the form to the corresponding input field in the Detail screen.	1. At the Forms tab, position the cursor over a line on the chosen form until the cursor changes to a check mark. 2. Right-click on the line and click on Jump to Input from the menu.	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN53293
13	K-1 Transfer Utility	Automatically imports K-1 data into Individual modules from Partnership, S-Corporation, and Fiduciary business modules and between business returns.	Mark the Return to be exported Then choose to export or import the K-1 data	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN57654
14	Like Kind Exchange Wizard	Saves time on accounting for like-kind exchanges in your client's tax return.	To enter a 1031 Exchange, on the DISPOSITION screen, select the asset and from left menu, pick LIKE-KIND EXCHANGE WIZARD	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN52585
15	Lockable Returns	Protects your tax returns from any changes including program updates.	Select a client in the client list, right-click and select Lock Return.	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN51759

16	Married Filing Separate/Joint Split	Allows you to split a joint return, compare MFJ vs. MFS, and review the entries made in the return to ensure that everything is allocated to either the taxpayer or spouse.	1. On Screen 1 (Client Information), mark the MFJ vs. MFS Comparison checkbox 2. Click on the Detail tab, then click on Screen 1, Client Information 3. Under the Filing Status section, check the box for MFJ vs MFS Comparison 4. Once the return is ready to be split, go to the Forms tab > select the MFJ vs. MFS worksheet > select "Click here to split the return"	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN53684
17	Missing Data Utility	Allows you to track and e-mail a list of missing data to your clients.	Right-click each field missing data and choose MISSING DATA. When done, click TOOLS > MISSING DATA > CREATE EMAIL.	http://www.youtube.com/watch?v=eqE8o-C7sPQ
18	Prior Year Amounts			
19	Schedule D Import	Automatically enters 1099 info into returns from Excel.	From the CLIENT menu, click IMPORT > SCHEDULE D IMPORT.	http://www.youtube.com/watch?v=1k6Q0VR4E-c
20	Default E-File	Automatically checks the Federal and state returns for e-file on Screen 1, Client Information.	1. Click on Settings > Options 2. Select the Tax Return tab 3. Under the Tax Return Options section, change the option "Default to e-file" to Yes or No	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=SLN68880
21	Shortcut Keys	26 Lacerte keyboard combinations to help you quickly navigate through the program.	See the full list of the 26 keyboard shortcuts from the online resources link to the right.	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=GEN54875
22	SmartMap / Trial Balance Utility	Imports trial balances from any accounting software (including Quickbooks) or Excel directly into Lacerte.	Click TRIAL BALANCE tab > IMPORT. Under the SmartMap column, click magnifying glass. Click POST TO RETURN	http://www.youtube.com/watch?v=U10wTwoJtvY

23	Split screen	View tax return forms and data entry fields side by side saving you time from going back and forth between the details tab and the forms tab. Great for reviewing tax returns and preparing "what if" scenarios for clients.	1. Click on a client file 2. From the top menu bar, click View > Details/Forms Split View	http://www.youtube.com/watch?v=cC55ca28eAQ
24	Sticky Notes	Reminds you of a certain task, form, or client. They can be either client specific or generic to all forms within all clients.	1. Drag and Drop the yellow square note icon from the toolbar to the location where you want the note. 2. Type your text in the Add New Note box 3. If you want the note to be seen in all clients, remove the check next to Client Specific 4. Click OK.	http://www.youtube.com/watch?v=DJhPRfdcopU
25	E-File Wizard	Helps you quickly select, validate, review and send returns. For an overview on how to use the new, streamlined e-file wizard and the improvements made, visit the online resource.	Click E-File on the top menu bar.	https://learn.intuit.com/files/upload/lacerteef/sendreturn/sendreturn.htm
26	Views and Display	Allows you to change multiple views and displays in Lacerte, including the ability to customize the welcome screen, access the specific information you need right on the Clients tab, and view multiple input screens and multiple forms at once.	There are several views and displays you can change and customize in Lacerte.	http://www.youtube.com/watch?v=4MIlesb6_ow
27	123 Govt Instructions	Allows you to access, from within Lacerte, the government instructions for all of the forms supported by Lacerte that have instructions published by the agency that created the form.	1. Start by viewing the desired form on the Forms tab. 2. Locate the Gray Forms title bar above the top of the form. 3. Click the "123 Govt Instructions" button.	http://accountants.intuit.com/support/tax/lacerte/document.jsp?product=LACERTE_TAX&id=HOW19644