

How to Make a Copy of a Client in Lacerte?

Meta Title: How to Make a Copy of a Client in Lacerte?

Meta Description: Learn how to make a client copy in Lacerte tax software. Duplicate client information effortlessly for efficient tax preparation with our step-by-step guide.

Making a copy of a return can be necessary for a number of reasons like Audits, tax planning, and modifying are the most frequent ones.

Learn how to make a copy of a client in Lacerte by following the below steps:

1. Select the **Clients tab** to view the list of your clients.
2. Make a choice on which client needs to be copied.

Views	Full Name (LNF)	Client No.	TP SSN	Status	Needs REP	St. Ret.
All Clients	A Contribution, Withdraw Excess	02SAMPLE	666-66-6666	Proform...		-
e-file Clients	A Couple, Basic and Average	03SAMPLE	222-22-2222	Proform...		US
e-org Clients	A Farmer, Joe and Sue	04SAMPLE	XXXXXXXXXX	Proform...		US
	A Filer, Electronic	05SAMPLE	999-99-9999	Proform...		US
	A Full IRA, Mr. and Ms.	06SAMPLE	444-44-4444	Proform...		US
	A Home, Office and Spouse	07SAMPLE	111-11-1111	Proform...		US
	A Keogh, Deduction	08SAMPLE	888-88-8888	Proform...		AZ
	A Limited IRA, Mr. and Ms.	09SAMPLE	333-33-3333	Proform...		US
	A Multi-State, Full Year and Nonresident	10SAMPLE	999-99-9999	Proform...		-
	A Multi-State, Part Year and Resident	11SAMPLE	999-99-9999	Proform...		-
	A Nondeductible, Mr. and Ms.	12SAMPLE	111-11-1111	Proform...		US
	A Partnership, Taxpayer and Partner	13SAMPLE	999-99-9999	Info Pen...		-
	A Passive Example, Mr. and Ms.	14SAMPLE	222-22-2222	Proform...		US
	A Sample, Child	15SAMPLE	333-22-4444	Proform...		US
	A Sample, Dad and Mom	16SAMPLE	999-99-9999	Proform...		US
	A Sole, Proprietor	17SAMPLE	555-55-5555	Proform...		US
	A Wage, Earner	18SAMPLE	111-11-1111	Proform...		US
	An Investor, Mr. and Ms.	19SAMPLE	555-55-5555	Proform...		US
	An Oil, Gas Example	20SAMPLE	777-77-7777	Proform...		US
	An Outside, Sales Rep	21SAMPLE	666-66-6666	Proform...		US

3. Choose a client.
4. Press **Ctrl + C** or choose **Copy**.
5. Type the **Client number for copy** into the **Copy Client** window.
6. Click **OK**.

You might have to re-apply for REP Access. Since the client's name, SSN, and EIN are same, you won't be charged.

If a client already exists with the **same client number**, Lacerte will ask you to replace the existing client with the one being cloned. Choosing **Yes** will replace the client; choosing **No** will keep the original client and cancel copying the client; and choosing **Cancel** will end the procedure.

Benefits:

Here're the 3 benefits of making a copy of a client in Lacerte:

- **Time saving:** Making a client copy allows you to instantly replicate client information, removing the need to manually re-enter data which saves time and effort during the tax preparation procedure.
- **Accuracy and consistency:** Making a copy ensures that all important client details and data are correctly reproduced. This helps to maintain consistency and lowers the possibility of mistakes or omissions during human data entry.
- **Streamlined workflow:** Having a client copy allows you to work on numerous versions of a client's tax return at the same time. This is especially helpful when dealing with circumstances like revised returns or evaluating alternative tax preparation techniques.

Conclusion:

Finally, the ability to replicate client information in Lacerte tax software provides a straightforward and fast approach to duplicate customer information. This streamlines the tax preparation procedure and saves time.

If you're still having trouble making a copy of a client in Lacerte and need more help, feel free to contact us at +1-855-223-4887.