

How to Make a Copy of a Client in Lacerte?

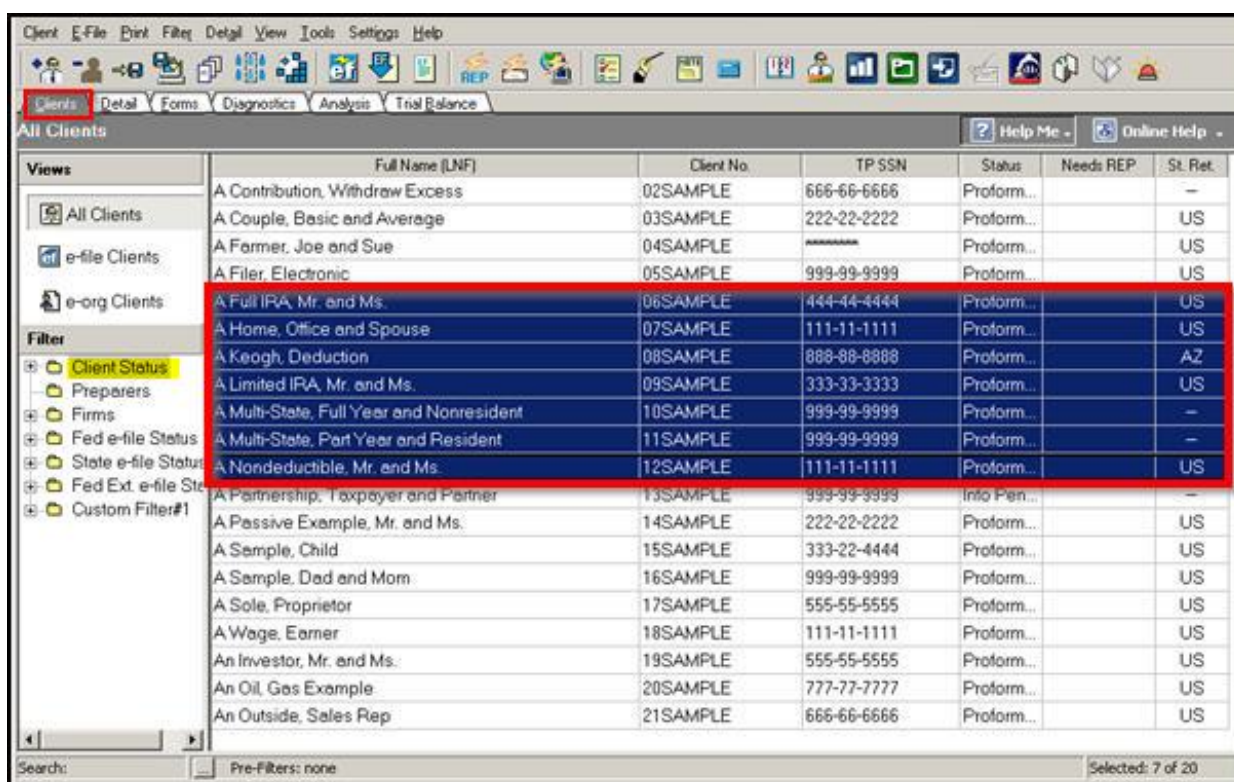
Meta Title: How to Make a Copy of a Client in Lacerte?

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.



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.