Lacerte® Tax Software

Getting Started Guide
Tax Year 2012

Welcome to your Lacerte products! We appreciate your business.

Please follow steps 1 through 4 in this guide:

- **Step 1:** *Install the Final 2011 Program*
- **Step 2:** *Install the 2012 Program*
- **Step 3:** *Transfer Your Clients*
- **Step 4:** *Learn How to Get Upcoming TY12 Releases*

For assistance, please visit
www.lacertesoftware.com/support
or contact us at 800-933-9999.

Step 1 | Install the Final 2011 Program

Use the steps below to install the final version of your 2011 Lacerte Tax program, which includes the Tax Year 2012 Proforma and Tax Organizer products. You will need the Proforma tool to transfer your 2011 clients to the 2012 tax program.

Follow these steps to install the final version of the 2011 program:

Option A: Install by CD or from My Account

1   Close all programs.

2   Insert the **2011 Lacerte Proforma CD** in your CD drive, or click the **Download 2011 Lacerte Tax Program - Release 3** from My Account on our Web site, and then click **Next** at the Welcome screen. (See page 11 if you need more information about Web Downloads).

> **Note:** If the installation wizard does not automatically start, click the **Start** button, select **Run**, and then type **D:\setup** (use the correct drive letter for your CD drive if it's not D).

3   Follow the simple instructions on each wizard screen.

Option B: Download from within Lacerte

1   Open **2011 Lacerte Tax program**.

2   On the Tools menu, select **Lacerte Updates**.

3   Click the **Update** button.

After you install the 2011 Lacerte Tax program, please go to the next section to install the 2012 Lacerte Tax program and transfer your prior year clients.

Step 2 | Install the 2012 Program

During tax season, we will have several product releases as we continue to update the program with tax changes. To keep your tax products up-to-date, please install each new release as soon as possible.

> **Note for Network Users:** Be sure to obtain all administrator or supervisory rights before installing the program.

Follow these steps to install the 2012 program:
Option A: Download from the Web (see below)
Option B: Install by CD (see page 3)

Instructions for Download from the Web:

1   Log in to the **My Account** website.

If you do not have an account, click on **Create Accoun**t on the right.

2   Select **My Lacerte** and then **Downloads**.

3   Click the link titled **Download 2012 Lacerte Tax Program**.

4   Click **Download Now**.

A dialog box will appear asking you to open or save the installer file. We recommend you click **Save** so you can later access it for each new CD release. Save the installer file to your Desktop or to a folder where you can easily find the installer file.

5   When the download of the installer file is complete, click **Run** to begin the installation.

**6**   Click **Next** on the Welcome screen to continue.

Follow steps 3 and above as stated in **Option B: Install by CD** (on page 3)

Instructions for Install by CD:

① Close all programs.

② Insert the **2012 Lacerte CD** in your CD drive, and then click **Next** at the Welcome screen.
(See page 11 if you need more information about Web Downloads).

> **Note:** If the installation wizard does not automatically start, click the **Start** button, select **Run,** and then type **D:\setup** (use the correct drive letter for your CD drive if it's not D). For Vista users, click Start, and then just type the command.

③ When asked to **Verify Firm Information,** please carefully review the information, and then choose **Yes** or **No.** *If you select Yes, you will continue with step 4. If you select No, you will see the screen below, which will guide you through a few ways to get your Preparer License File (when finished, you will continue with step 4).*
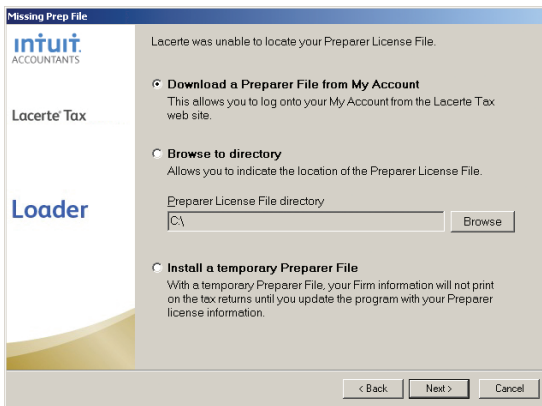
④ To continue with the installation, please read and accept the **Electronic License Agreement,** and then click **OK.**

5 Select the **Programs** you want to install, and then click **Next.**
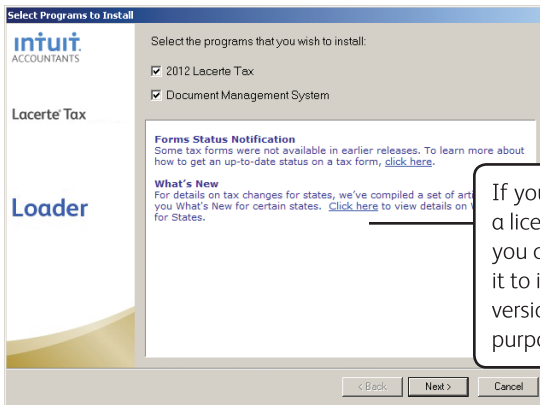
> If you did not purchase a license for DMS, you can still select it to install a demo version for evaluation purposes.

> **Note:** If you selected DMS, this installation will start as soon as Lacerte Tax is finished.

> **Note for DMS Users:** If you download your 2012 tax software from the web versus the included CD, DMS was not included in your download. To install DMS, you will need to login to My Account, click My Lacerte, and download DMS from that page.

6 Verify the **Destination Location,** type a new location in the box, or click **Browse** to choose a location, and then click **Next.** *(The installation uses the same path as last year, or if you're a new user, it uses the default path).*

> **Note for Network Users:** First, you will need to enter a shared network location, and then a location for the workstation you're on. Be sure the network path you choose is a shared location, so your network workstations can easily access Master Options and Program Updates.

Network users only (Shared Location):

All users (Workstation Location):

7 In the **Select States** dialog, choose only the products you need for tax season, and then click **Next.** The products you choose are the ones that will be updated throughout tax season via major releases, Internet Updates, and Web downloads. Being selective on this screen will eliminate the need for unnecessary notifications that don't apply to you, and will reduce the size of the downloads.
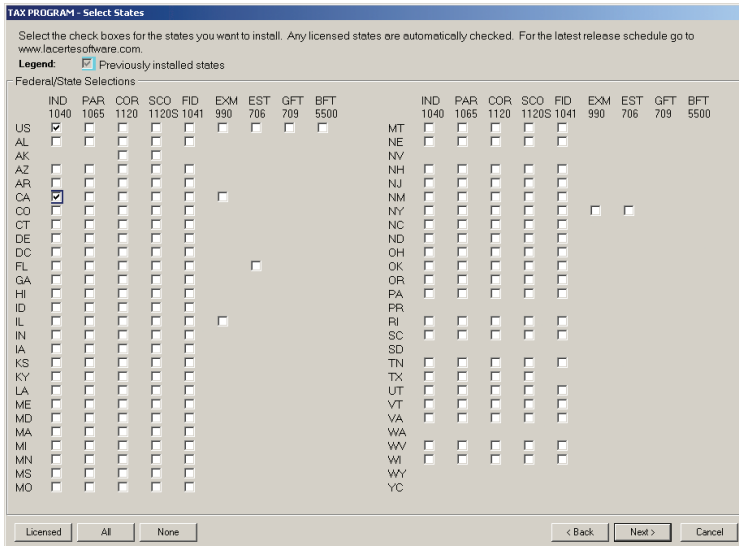
8 In the **Lacerte Update Scheduler** dialog, select **Yes** or **No,** then click **Next.**

9 In the **Review Current Settings** dialog, verify the settings, and then click **Install.** Click the **Back** button if you need to make changes.
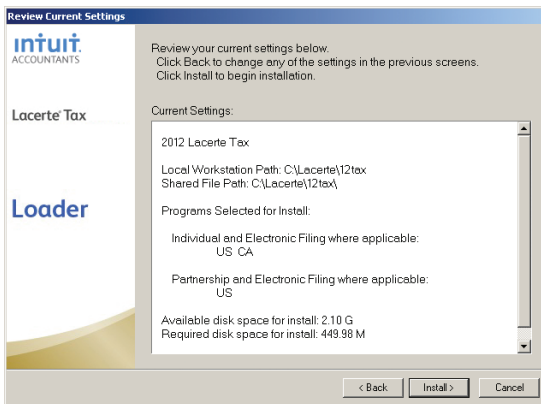
10 For non-network users, when the **Installation Complete** dialog appears, click **Finish.** *Your installation is now complete!*

For network users, when the **Installation Complete** dialog appears, click **Finish** to install the program to the workstation you're on. *Then, go to the next section to install the program on each additional workstation!*

> **Note:** The loader may install additional components after the tax program is done. Please wait for these components to finish installing.

Additional Instructions for Network Users

If you installed the network version, you must also install the tax program on each workstation. Then, you will be able to grant and revoke rights for Lacerte users on your network.

Part 1: Install the Program on Each Workstation

After installing the program on the network server, follow these steps to install the tax program on each workstation: (Then, whenever new versions are installed on your network server, all workstations will automatically be updated as well).

1 Go to a workstation on which you want to install the Lacerte program, and then close all programs.

2 Click the **Start** button, and then select **Run.** *(Vista users only need to click Start here).*

3 In the box, type the following:
X:\lacerte\12tax\setup12\taxsetup.exe
(Use the correct drive letter and/or directory for your network if they're not X:\lacerte).

4 In the **Destination Location** dialog, verify the local workstation path, type a new location in the box, or click **Browse** to choose a location.

5 In the **Review Current Settings** dialog, verify the settings, and then click **Install.** Use the **Back** button if you need to make changes.

6 When the **Installation Complete** dialog displays, click **Launch Lacerte.**
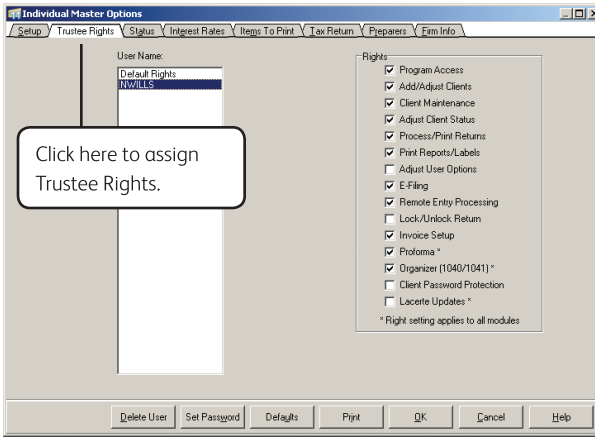
> **Note:** The loader may install additional components after the tax program is done. Please wait for these components to finish installing.

7 Repeat steps 1 through 6 on each applicable workstation.

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Part 2: Grant Lacerte User Rights on Your Network

Using the steps below, Lacerte provides your network administrator the ability to grant and revoke Trustee Rights for each user on your network:

1   Be sure all network users have closed the tax program.

2   Open the **2012 Lacerte Tax program.**

3   On the **Settings** menu, click **Master Options.** If prompted, enter the master password, and then click **OK.**

4   Click the **Trustee Rights** tab.

Individual Master Options

Setup | Trustee Rights | Status | Interest Rates | Items To Print | Tax Return | Preparers | Firm Info

User Name:
Default Rights
NWILLS

Click here to assign Trustee Rights.

Rights
☑ Program Access
☑ Add/Adjust Clients
☑ Client Maintenance
☑ Adjust Client Status
☑ Process/Print Returns
☑ Print Reports/Labels
☐ Adjust User Options
☑ E-Filing
☑ Remote Entry Processing
☐ Lock/Unlock Return
☑ Invoice Setup
☑ Proforma *
☑ Organizer (1040/1041) *
☐ Client Password Protection
☐ Lacerte Updates *

* Right setting applies to all modules

Delete User | Set Password | Defaults | Print | OK | Cancel | Help

5   In the **User Name** list, select a user. (Clicking **Default Rights** will set default rights for all new users).

6   Use the **check boxes** to grant or revoke the available rights. Press **F1** to learn more about each option listed.

7   Repeat steps 5 and 6 for each user.

8   Click **OK.**

> **Note:** If you have revoked rights for Lacerte Updates, users will not be notified of updates and can not download them. Their workstations will be updated when opening or closing Lacerte, if an update has been downloaded.

Part 3: Verify Rights and Permissions on Your Network

Before accessing the program, verify that your network users have the network Full Control Permission to the Lacerte Tax program, Data Path, and System File Path.

Step 3 | Transfer Your Clients

The Proforma Wizard simply transfers your 2011 client data files to the 2012 Lacerte Tax program. **Please do <u>not</u> use this section if you already transferred your 2011 clients.**
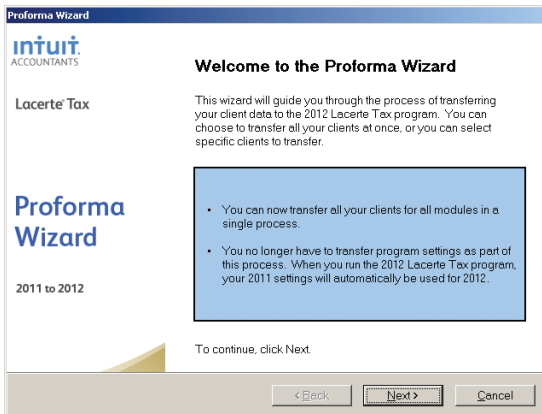
Follow these steps to run the Proforma Wizard:

1   Open the **2011 Lacerte Tax program**.

If this is your first time to open the 2011 program since installing the 2011 Proforma release, you will be prompted with this dialog:
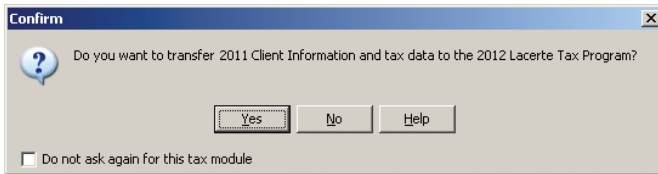
2   In the **Confirm** dialog, click **Yes** to start the Proforma Wizard, as follows:

> **Note:** If you are not prompted with the dialog above, please do this: From the **Clients** screen, go to the **Tools** menu, and then click **Transfer Clients (Proforma to 2012)**.

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3 Follow the simple instructions on each wizard screen, and use the buttons at the bottom of the screens to move through the wizard.

4 When you finish the Proforma Wizard, close the 2011 Lacerte Tax program.

Next time you open the 2012 Lacerte Tax program, your transferred clients will automatically appear.

TIP! The Tax Organizer and E-Organizer products are also included on this 2011 Proforma release. To access them, from the **Clients** screen, go to the **Tools** menu, and then click **Organizer**.

Step 4 | Learn How to Get Upcoming TY12 Releases

It is critical that you always have the most up-to-date version of the 2012 Lacerte Tax program. Because all remaining TY12 product releases will be available via the Internet only, please be sure you are familiar with the following two methods of getting the latest version. **Either method below will provide you with all remaining releases offered in TY12.**

Lacerte Updates (get releases from within the program)

Note: You must have the 2012 tax program currently installed to use Lacerte Updates.

As long as you have the 2012 tax program installed, you can simply get upcoming product releases from inside the program as they become available. Just follow the easy steps below.

Also, if you just installed 2012 Lacerte Tax program, please use these steps to check for product updates now. Going through the Lacerte Updates wizard now will speed up the process going forward.

1 Open the **2012 Lacerte Tax program.**

2 From the **Tools** menu, select **Lacerte Updates.**

3 Follow the simple instructions on each wizard screen.

You can also use the **Lacerte Update Scheduler**, a simple tool that works in conjunction with Lacerte Updates. It runs in the background so it won't interrupt your normal workflow, and it automatically checks for updates and downloads them at pre-set time intervals. The Scheduler installs automatically whenever you install any Lacerte Tax program. To get started, just right-click the Update Scheduler icon in your System Tray, located in the lower right-hand corner of your screen.

Web Downloads (get releases from our Web site)

> **Note:** You do **not** need to have the 2012 tax program currently installed to get Web Downloads.

Using the My Account feature on our Web site, follow these steps to download upcoming product releases as they become available (including 2012 Lacerte Tax - Release 1). Because you don't have to have the 2012 tax program currently installed, you can use these steps rather than installing the enclosed CDs.

> **Note:** To complete this process, you must be signed up for My Account and have your login credentials (username and password) ready to enter.

1. Go to our Web site at **www.lacertesoftware.com.**

2. Click the **My Account** link.

3. Login to **My Account** (if prompted).

4. Click **My Lacerte**, and then **Downloads**.

5. Click the link for the tax year you want (for example, Download 2012 Lacerte Tax Program).

6. Click the **Download Now** button, and then click **Run.** (If using FireFox, you will be prompted to Save the setup file to your computer before running it).

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Lacerte® Tax Software

Tax Year 2012

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