| Feature Requested | Number of Customer Requests for this Feature | Status | Additional Comments |
|---|---|---|---|
| Password Protected PDFs | 606 | Completed - Tax Year 2012 | |
| NEW PDF Print functionality | 524 | Completed - Tax Year 2013 | |
| Mask social security numbers | 302 | Completed - Tax Year 2012 | |
| Program / firm level passwords | 209 | Completed - Tax Year 2013 | |
| Ability to delete this year | 140 | Completed - Tax Year 2010 | |
| Customizable PDF e-mail templates | 121 | Completed - Tax Year 2013 | |
| Create organizers for 1041s | 90 | Completed - Tax Year 2010 | |
| Changes to Client Tracker | 83 | Completed - Tax Year 2012 | Support for Client Tracker was discontinued in Tax Year 2012 to support the development and launch of Intuit Practice Management which will be available to customers for Tax Year 2013. To learn more, visit intuitpracticemanagement.com. |
| Don't install esort by default | 69 | Completed - Prior to Tax Year 2010 | |
| Remove deadline for Organizer | 54 | Completed - Tax Year 2012 | We've extended the deadline for Organizer to expire on July 31 now. However, we are currently unable to eliminate the deadline completely. |
| Email appointment confirmation | 53 | Completed - Tax Year 2012 | Recently Intuit integrated the functionality of Lacerte with DemandForce. Demandforce allows you to automatically email appointment confirmations, gather reviews, gently remind clients of upcoming key dates, etc. Find out more at demandforce.com. |
| Print on both sides of the page | 51 | Completed - Prior to Tax Year 2010 | This feature was made available in Lacerte Tax Year 2010. However, the ability to print on both sides of the paper must also be supported by the printer you're using for this functionality to work. |

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| Support Lacerte on Mac | 48 | Completed - Tax Year 2012 | Lacerte can be supported on Mac with the use of VM or Parallels software. |
| Include IRS updates and penalties in program updates | 47 | Completed - Tax Year 2012 | IRS updates and penalties are released very often - more often than Lacerte program updates. To avoid increasing the number of program updates you receive, IRS updates are combined and included in the latest Lacerte program updates. in between program updates, you can access IRS updates and penalties at any time by clicking "Download" in the Options screen. |
| K-1 export to all returns, not just 1040 | 43 | Completed - Tax Year 2010 | |
| Streamline form 8938 and TDF 90-22.1 | 43 | Completed - Tax Year 2012 | |
| PDF Attach for 1040s | 41 | Completed - Tax Year 2012 | |
| Able to choose between printing Paper Organizer or E-Organizer | 39 | Completed - Prior to Tax Year 2010 | |
| Change Ask Intuit button to Ask Lacerte | 35 | Completed - Tax Year 2011 | |
| Allow DMS to export select tax years | 33 | Completed - Prior to Tax Year 2010 | |
| Search within scanned docs | 32 | Completed - Prior to Tax Year 2010 | |
| Ability to define the default zoom level for Forms View | 28 | Completed - Prior to Tax Year 2010 | |
| Print preparer's name on Federal forms 1040, 1120, etc. | 24 | Completed - Prior to Tax Year 2010 | |
| Improve e-mail support system | 24 | Completed - Tax Year 2011 | |
| Auto-calculate feature is slowing down the software | 24 | Completed - Tax Year 2011 | |
| Print short-term capital loss carryovers | 23 | Completed - Prior to Tax Year 2010 | |
| Need a secure way for clients to communicate securely. Portal? | 23 | Completed - Tax Year 2012 | |
| Add appointments to Outlook or Google Calendar to make it easier to schedule client visits | 21 | Completed - Tax Year 2012 | |
| Improve support | 21 | Completed - Tax Year 2012 | Brought all Lacerte Phone support on-shore and identified and trained new support agents. |
| Mask SSN | 20 | Completed - Tax Year 2012 | |

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| General Modifications to Appointment Scheduling | 10 | Completed - Tax Year 2012 | Recently Intuit integrated the functionality of Lacerte with DemandForce. Demandforce allows you to automatically email appointment confirmations, gather reviews, gently remind clients of upcoming key dates, etc. Find out more at demandforce.com. |
| Include weblinks in Client Letter | 7 | Completed - Prior to Tax Year 2010 | To create client letters with weblinks, we recommend opening the letter in Microsoft Word and adding the link manually. From there you can email multiple clients a copy of the letter using Word's email merge functionality. For more information on how to use Word's email merge feature, visit http://support.microsoft.com/kb/294694 |
| Print K-1s to DMS | 7 | Completed - Prior to Tax Year 2010 | |
| Ability to print multiple copies of invoices and client letters | 7 | Completed - Prior to Tax Year 2010 | |
| Download 1099 data into returns | 7 | Completed - Tax Year 2010 | 1099 Data can be entered into Lacerte in 2 ways - vis the Schedule D Import wizard or Lacerte Tax Import. |
| E-Filing extension forms should look different than E-Filing tax returns | 7 | Completed - Tax Year 2011 | |
| Email encryped PDFs | 7 | Completed - Tax Year 2011 | |
| Add Merrill Lynch and Goldman Sachs to Tax Import | 6 | Completed - Tax Year 2011 | |

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| Organizer Pay-per-return | 4 | Completed - Prior to Tax Year 2010 | There's no need to pay-per-organizer, even for new clients. You can make organizers for existing clients for free. For new clients you can either enter all of their prior year information and generate an organizer, OR you can open an existing client and print a blank organizer for your new client to complete. |
| Ability to Print Client Invoice and Filing Instruction Letter | 1 | Completed - Prior to Tax Year 2010 | |
| Ability to print filing instructions for just one form | 1 | Completed - Prior to Tax Year 2010 | |