

How to Request eSignature Plus Payment in Lacerte

If you would like to request client payment at the same time as electronic signature, take the following steps.

1. Click on the Clients tab in Lacerte to display the client list. Then choose a client and click **Request** in the eSig Status column.
2. In the eSignature Forms window, click the checkboxes to choose the forms you want the client to sign. Then click **OK**.
3. The eSignature Request wizard will display the client name and email address. Click the checkbox if you would like to send a follow-up request to the client's spouse.
4. If desired, you can edit the subject line and body of the email request to customize the message.
5. Click the checkbox to **Include Payment Request**.
6. If there is a balance in Lacerte, it will automatically populate the Amount Requested. Otherwise, you can manually enter the amount requested.
7. Click **Request eSignature** to finish and send the request.

Start Request

Client No.	TP SSN	Initia Link	Status	Needs REP/Auth	St. Ret.	eSig Status
3	222-22-2404	Intuit	Info Pending	US	Voided	
4	222-22-2404	Intuit	Info Pending	US	Multiple	
6	222-22-2406	Intuit	Info Pending	US	Multiple	
7	222-22-2407	Intuit	Info Pending	US	Consolidated	
8	222-22-2409	Intuit	Info Pending	US	Multiple	Sent
2	222-22-2402	Intuit	Info Pending	US	Multiple	
9	458-05-2345	Intuit	Info Pending	US	Multiple	Consolidated

Choose Forms for Signature

Include Payment Request

Request eSignature

Taxpayer's Signature Email: [email address]

Spouse's Signature Email: [email address]

Subject Line: ACTION NEEDED: Signature required for IRS Form 8879

Email Message: Please review and sign this tax return authorization.

Include Payment Request Amount Requested: 494

Balance: 494 Available eSignatures: 1

Attachments: Federal 8879 Complete Return for 10

Request eSignature

For More Information

For more information on eSignature, please visit: proconnect.intuit.com/esignature-lacerte

If you have questions, please contact: esignature@intuit.com