Welcome to Lacerte® products! We appreciate your business.

Installing Your Lacerte Program

1. Install the 2015 Program if not currently installed
2. Install the 2016 Program

New to Lacerte or just need some refresher training?

Please visit our New User Welcome Center **IntuitProConnect. com/LCWelcomeCenter** for an awesome training experience complete with live and recorded webinars along with resource material to get you started.

Having trouble with your download process? Let us help you!

Please visit **www.lacertesoftware.com/support** or call us at **800-933-9999**.

Install the Final 2015 Lacerte Program CD

In order to utilize the Proforma/Organizer functionality, you will need to install the Final 2015 Lacerte Program. We also have an installation video for your convenience: **https://youtu.be/CQ0CLBhTvuY**.

> **Note:** If you currently have the 2015 Program installed, be sure to run Internet updates by selecting Tools > Lacerte Updates to get the Proforma/Organizer functionality. You can follow these same steps below for the installation of the 2016 Program CD.

1 Close all programs.

2 Insert the **2015 Lacerte Proforma CD** in your CD drive, and then click **Next** at the Welcome Screen.

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

3 Verify Firm Data

> **Note:** You cannot proceed with the installation until your Firm Information is established.

Existing Customers

Select your Firm Information in the screen pop-up window and click **OK**. If you do not see your Firm Information, you will see this screen:

Select the first option: **Download a Preparer from My Account**. Click **Next**.

New Customers

Establish your Firm Information: You will see the screen on the left, click **Next**, followed by the screen below to assist you in getting your Preparer License File.

Enter User Name and Password (If you do not have a user name and password set up yet, go to **accounts.intuit.com/signin.html** and create a user log in). Click **Login**.

4 Read and accept the **End User License Agreement**, and then click **OK**.

5 Select the Programs you want to install, and then click **Next**.

6 Verify the **Destination Location**: Accept the default location or type (or click **Browse** to) a new location in the box, 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 that the network workstations can easily access Master Options and Program Updates. Verify Lacerte Tax program, Data Path, and System File Path permissions with your IT professional.

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.
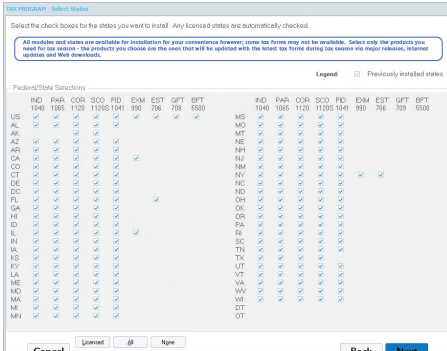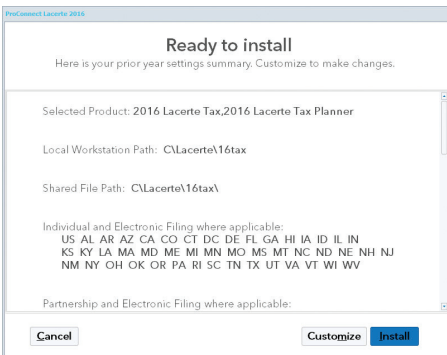

Tip! Being selective on this screen will eliminate the need for unnecessary notifications that do not apply to you. This will reduce the storage space for your platform and the number of download updates. It is easier to add additional tax modules and/or states to your platform than it is to uninstall unnecessary products.

8 In the **Lacerte Update Scheduler** dialog, select **Yes** or **No,** then click **Next.**

Note: Selecting Yes will enable the Scheduler which allows you to select the best time to schedule when to check for product updates and not interrupt your workday.

9 In the **Review Current Settings** dialog, verify the settings. If you need to make changes, Click the **Back** button to make any adjustments. Once completely verified, click **Install**.


Ready to install
Here is your prior year settings summary. Customize to make changes.

Selected Product: 2016 Lacerte Tax, 2016 Lacerte Tax Planner

Local Workstation Path: C\Lacerte\16tax

Shared File Path: C\Lacerte\16tax\

Individual and Electronic Filing where applicable:
US AL AR AZ CA CO CT DC DE FL GA HI IA ID IL IN
KS KY LA MA MD ME MI MN MO MS MT NC ND NE NH NJ
NM NY OH OK OR PA RI SC TN TX UT VA VT WI WV

Partnership and Electronic Filing where applicable:

Cancel   Customize   Install

For non-network users, when the **Installation Complete** dialog appears, click Finish. Congratulations! Your installation is now complete.

Additional Instructions for Network Users

If you installed the network version, you must also install the tax program on each workstation.

For network users, when the **Installation Complete** dialog appears, click **Finish** to install the program to the workstation you are on. You will have the option to print instructions to install the program on each additional workstation.
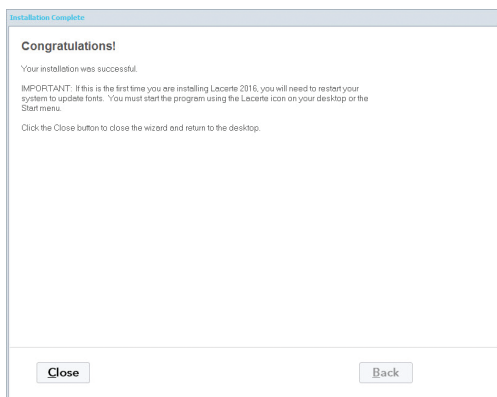
> **Note:** You can also refer to article **GEN51394** on our Lacerte Support page for Network Installation Instructions: **https://accountants.intuit.com/support/tax/lacerte**

Grant Lacerte User Rights as an Administrator on Your Network

1 Be sure all network users have closed the tax program in order for changes to take effect. Any user remaining in the tax program while this update occurs will not get these changes applied to their user options.

2 Open the **2015 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.
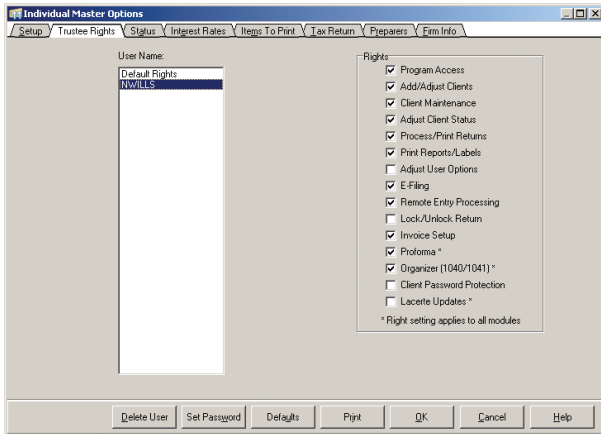
5 In the **User Name** list, select a user. (Clicking **Default Rights** will set default rights for all new users).

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.**

Install the 2016 Lacerte Program CD

The good news is, if you just installed the 2015 Lacerte Program CD or you already had the Final 2015 Lacerte Program installed on your workstation(s) your next steps will be quick and simple! All your options, user's rights and settings will be automatically pulled forward and applied to your 2016 Program. All you have to is install and follow the CD instructions!

> **Tip!** During tax season, we will have several product releases to provide you with up-to-to-date tax changes and product enhancements. To keep your program fully updated, please install each new release as soon as possible.

Instructions for Download from the Web:

1. Log in to the **My Account** website.
   If you do not have an account, click on **Create Account**.

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

3. Click the link titled **Download 2016 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 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.