INTUIT
Lacerte® Tax

Keyboard Shortcuts

Press **F2** for a complete list of shortcut keys, found in the *Lacerte Assistant* under the **Shortcut Keys** topic.

ALL AREAS

Alt + C or D or F or I | Access the Clients, Detail, Forms or Diagnostics tabs

Ctrl + Alt + C | Corporation tax program

Alt + ➡ or ⬅ | Move between the main program tabs

Ctrl + Alt + S | S-Corporation tax program

Ctrl + H | Calendar

Ctrl + Alt + F | Fiduciary tax program

Ctrl + L | Lacerte email utility

Ctrl + Alt + E | Exempt Organization tax program

Ctrl + O | Options

Ctrl + Alt + T | Estate tax program

Ctrl + P | Print tax returns

Ctrl + Alt + G | Gift tax program

Ctrl + Q | Communication Manager

Ctrl + U | E-file Validate and Send Wizard

Ctrl + F5 | Appointment Manager

Ctrl + Alt + I | Individual tax program

Ctrl + Alt + P | Partnership tax program

F1 | Help

F2 | Lacerte Assistant

F4 | Assign client status

F5 | Check client file's REP status

F10 | System Information window

CLIENTS TAB

Ctrl or Shift + (mouse click) | Select a random group of clients

Enter or double-click mouse | Access the Detail tab for a client

Spacebar | Tag or select a client or group of clients

Ctrl + A | Add a new client file

Ctrl + B | Back up client(s) to a specified location

Ctrl + C | Copy and rename client files

Ctrl + D | Delete one client or a group of clients

Ctrl + I | Find a client file

Ctrl + N | Rename client files

Ctrl + R | Restore client(s) from a specified location

F3 | Group select client files

F5 | Check client file's REP status

F7 | Select a pre-filter view of the client list

DETAIL TAB

Ctrl + ➡ or ⬅ | Move along the tabs at the bottom of the screen

Ctrl + ⬆ | Move to the previous property or grid entry

Ctrl + ⬇ | Move to the next property or grid entry

Ctrl + PgUp | Move to previous section of an input screen

Ctrl + PgDn | Move to next section of an input screen

Spacebar | Mark check box

Tab | Move between one input field and the next

Ctrl + Tab | Move to the first field in expanded input from grid

Ctrl + A | Add W-2, 1099, property, assets, etc...

Ctrl + D | Delete W-2, 1099, property, assets, etc...

Ctrl + E | Access code Notes to create a statement

Ctrl + F | Open Find Items

Shift + F6 | Insert Calculator amount

Ctrl + T | Open lists

Ctrl + W | Switch to Batch Input

F6 | Change State

F10 | System Information window

FORMS TAB

Ctrl + ➡ or ⬅ | Move along the tabs at the bottom of the screen

Tab | Move between the form being viewed and the lists

Ctrl + S | View Statements

10-Keypad | Access various pages of a form (when applicable)

DIAGNOSTICS TAB

Alt + S | Access the Diagnostic Filter list

Alt + W | Access the Critical Diagnostics list

Alt + O | Access the Informational Diagnostics list

Tab | Switch between the various lists

Enter | Jump to input on selected diagnostic

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CPE-ELIGIBLE WEBINARS*

Here are just a few of the topics we cover:

- What's new in Lacerte
- Ethics
- QBI tax strategies
- Basic, intermediate, and advanced data entry

* CPE credits are only available for live webinars, not recordings.

PERSONALIZED TRAINING PORTAL

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