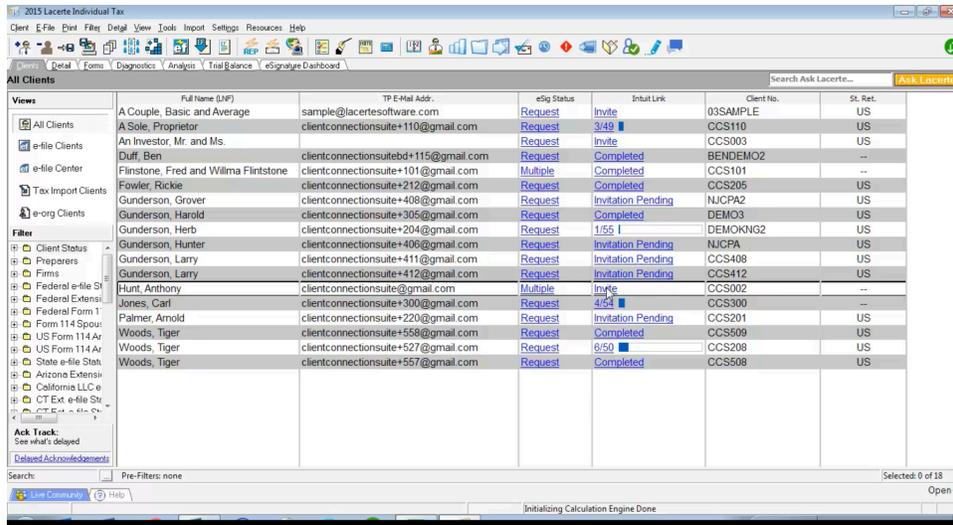


Intuit Link: How to Personalize an Engagement Letter

There are two options to personalize an engagement letter.

First Option: Use your organizer section in the prior year program

Step 1: Click the “Invite” Button

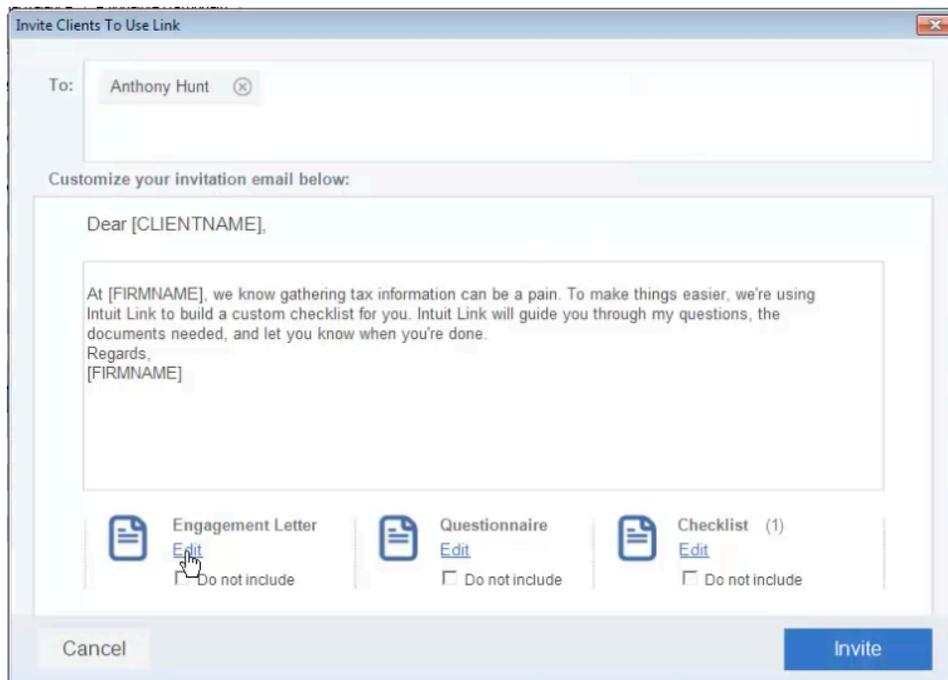


The screenshot shows the Intuit Lacerte software interface. The main window displays a list of clients under the heading "All Clients". The list includes columns for Full Name (NP), TPE-Mail Addr., eFile Status, Intuit Link, Client No., and St. Ret. The "Intuit Link" column shows various statuses such as "Request", "Completed", and "Invitation Pending". A search bar at the top right contains the text "Search Ask Lacerte..." and a button labeled "Ask Lacerte".

Full Name (NP)	TPE-Mail Addr.	eFile Status	Intuit Link	Client No.	St. Ret.
A Couple, Basic and Average	sample@lacertesoftware.com	Request	Invite	03SAMPLE	US
A Sole, Proprietor	clientconnectionsuite+110@gmail.com	Request	3/49	CCS110	US
An Investor, Mr. and Ms.		Request	Invite	CCS003	US
Duff, Ben	clientconnectionsuiteb4+115@gmail.com	Request	Completed	BENDEMO2	--
Flinstone, Fred and Wilma Flinstone	clientconnectionsuite+101@gmail.com	Multiple	Completed	CCS101	--
Fowler, Rickie	clientconnectionsuite+212@gmail.com	Request	Completed	CCS205	US
Gunderson, Grover	clientconnectionsuite+408@gmail.com	Request	Invitation Pending	NJCPA2	US
Gunderson, Harold	clientconnectionsuite+305@gmail.com	Request	Completed	DEMO3	US
Gunderson, Herb	clientconnectionsuite+204@gmail.com	Request	1/55	DEMOKNG2	US
Gunderson, Hunter	clientconnectionsuite+406@gmail.com	Request	Invitation Pending	NJCPA	US
Gunderson, Larry	clientconnectionsuite+411@gmail.com	Request	Invitation Pending	CCS408	US
Gunderson, Larry	clientconnectionsuite+412@gmail.com	Request	Invitation Pending	CCS412	US
Hunt, Anthony	clientconnectionsuite@gmail.com	Multiple	Invite	CCS002	--
Jones, Carl	clientconnectionsuite+300@gmail.com	Request	4/54	CCS300	--
Palmer, Arnold	clientconnectionsuite+220@gmail.com	Request	Invitation Pending	CCS201	US
Woods, Tiger	clientconnectionsuite+558@gmail.com	Request	Completed	CCS509	US
Woods, Tiger	clientconnectionsuite+527@gmail.com	Request	6/50	CCS208	US
Woods, Tiger	clientconnectionsuite+557@gmail.com	Request	Completed	CCS508	US

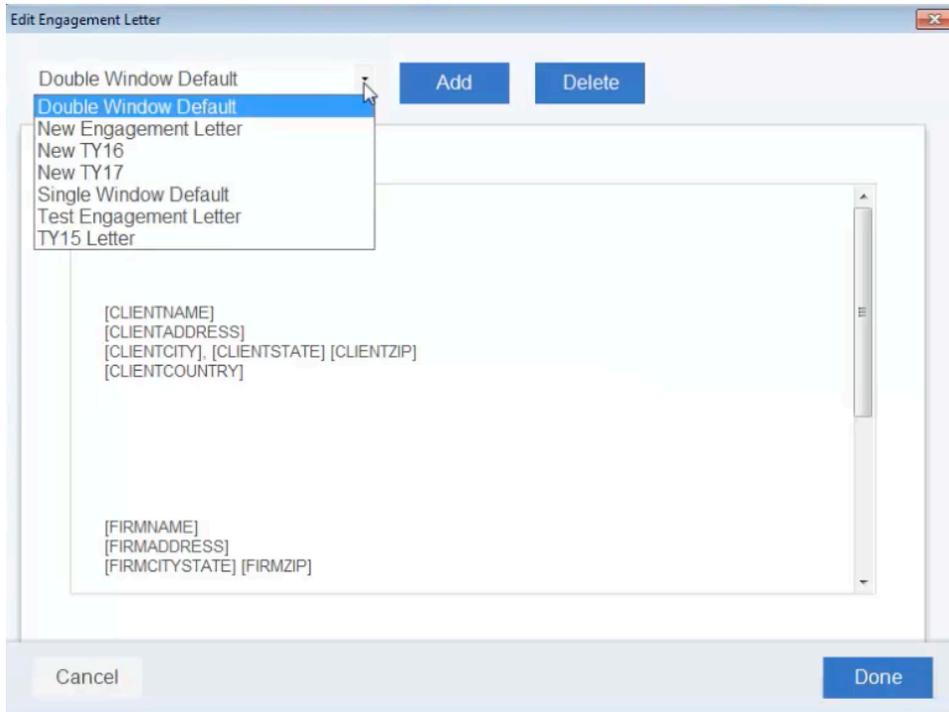
This generates the email wizard and template to send to your customers.

Step 2: Locate the engagement section and then click “edit.”

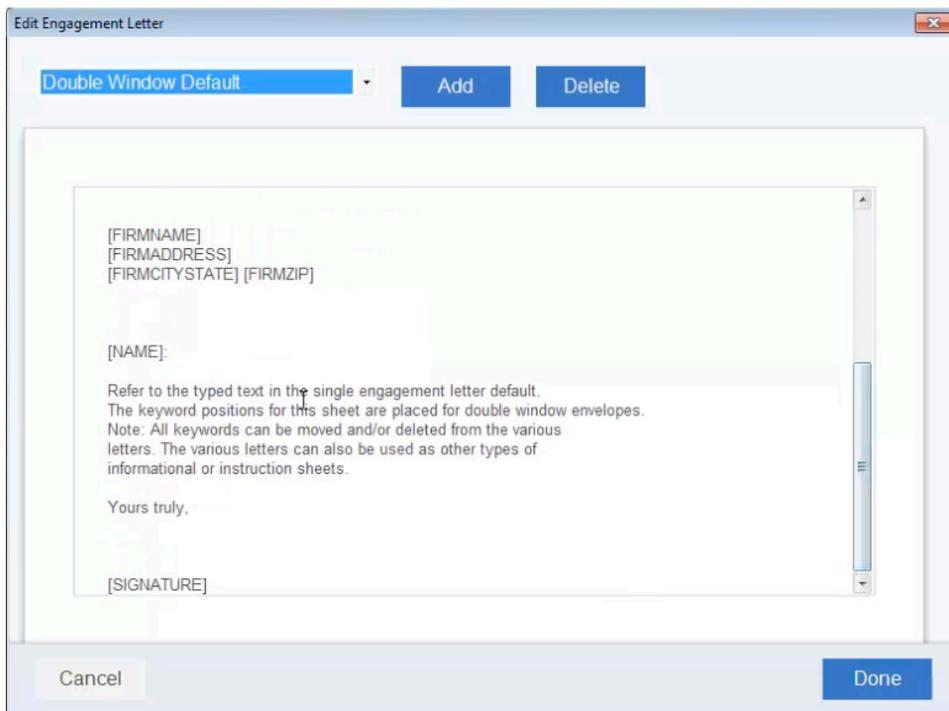


The screenshot shows the "Invite Clients To Use Link" dialog box. The "To:" field contains "Anthony Hunt". Below this, there is a section titled "Customize your invitation email below:" with a text area containing a template email. The template starts with "Dear [CLIENTNAME]," followed by a paragraph: "At [FIRMNAME], we know gathering tax information can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you. Intuit Link will guide you through my questions, the documents needed, and let you know when you're done." It ends with "Regards, [FIRMNAME]". At the bottom, there are three sections for selecting documents to include: "Engagement Letter" (with an "Edit" button and a "Do not include" checkbox), "Questionnaire" (with an "Edit" button and a "Do not include" checkbox), and "Checklist (1)" (with an "Edit" button and a "Do not include" checkbox). The "Engagement Letter" checkbox is checked. At the bottom of the dialog are "Cancel" and "Invite" buttons.

If you already have your engagement letter stored in the organizer portion of lacerate it will be located in this drop down menu.

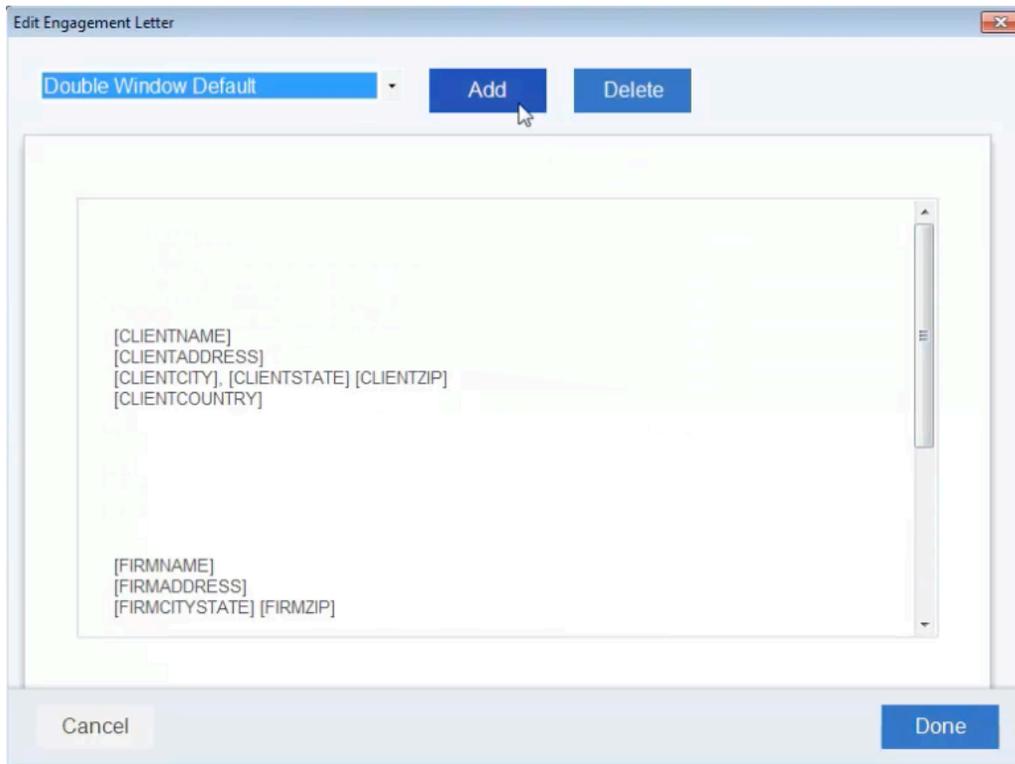


If not, we have some standard templates that you can use and customize moving forward.

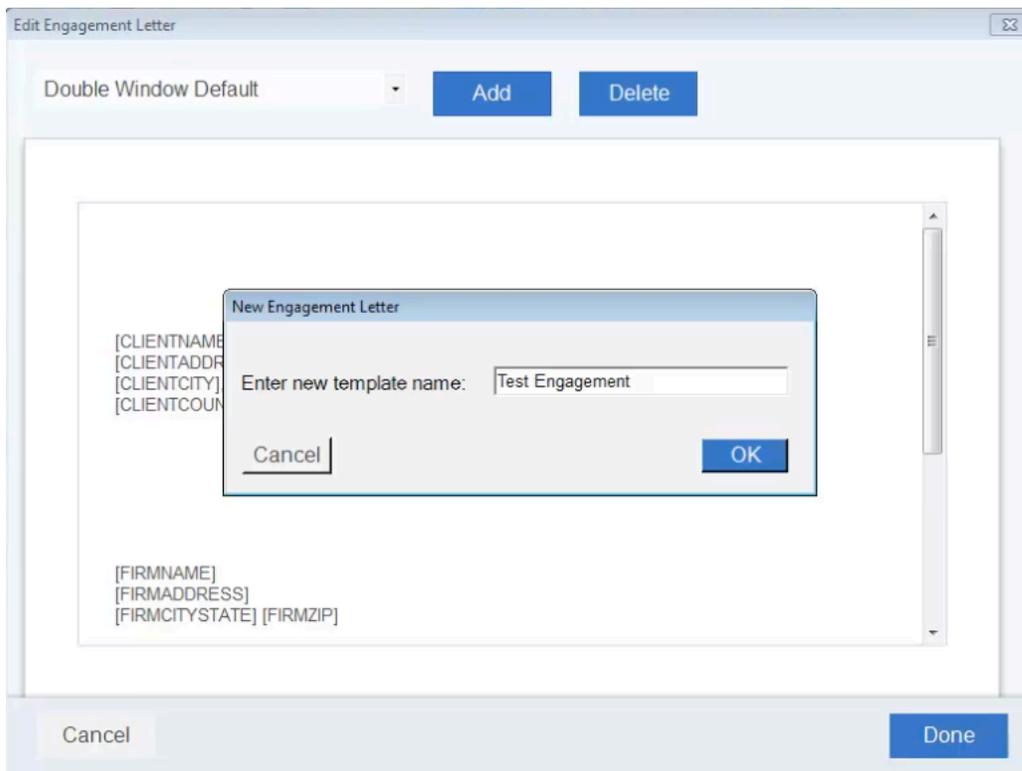


Second Option: Add new engagement letter.

Step 1: Click the “Add” button

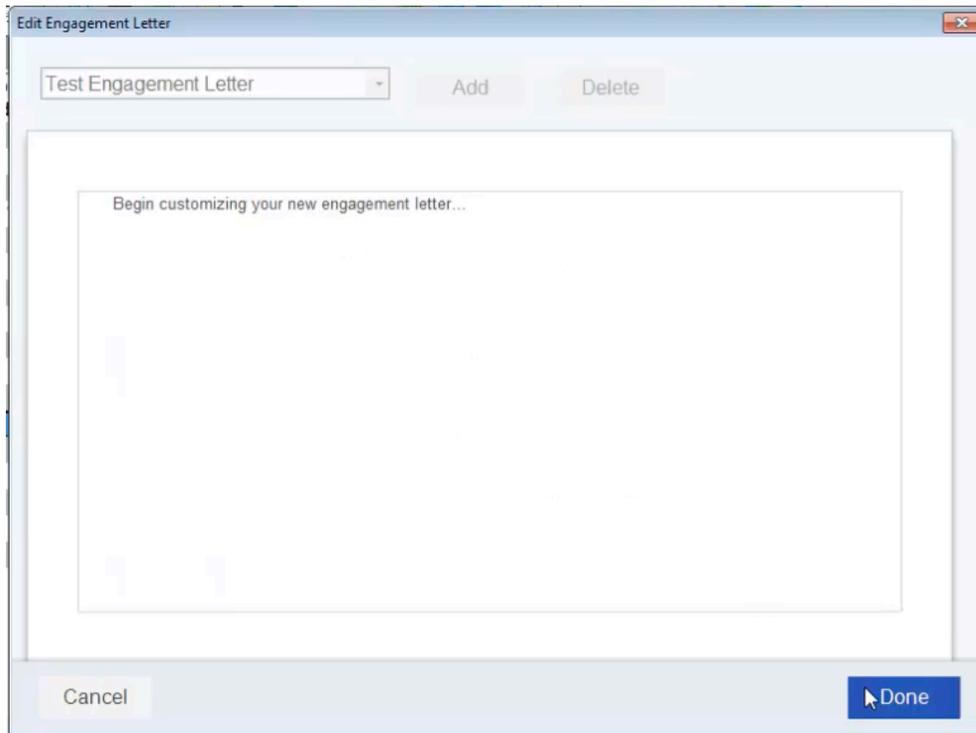


Step 2: Name your engagement letter – then click okay



Step 3: Customize letter add text.

Step 4: Once everything looks the way you want it, click “Done”



Step 5: When asked if you want to save, click “Yes”

