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

<u>Step 1</u>: Click the "Invite" Button

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This generates the email wizard and template to send to your customers. Step 2: Locate the engagement section and then click "edit."

vite Clie	nts To Use Link	X
To:	Anthony Hunt 🛞	
Cust	tomize your invitation email below:	
	Dear [CLIENTNAME],	
	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. Regards, [FIRMNAME]	
	Engagement Letter Edit Do not include	
Ca	ancel	

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

Edit Engagement Letter	×
Double Window Default Double Window Default New Engagement Letter New TY16 New TY17 Single Window Default Test Engagement Letter TY15 Letter [CLIENTNAME] [CLIENTADDRESS] [CLIENTCOUNTRY]	н
[FIRMNAME] [FIRMADDRESS] [FIRMCITYSTATE] [FIRMZIP]	Done

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

ouble Window Default Add Delete	
[FIRMNAME] [FIRMADDRESS] [FIRMCITYSTATE] [FIRMZIP]	•
[NAME]: Refer to the typed text in the single engagement letter default. The keyword positions for this sheet are placed for double window envelopes. Note: All keywords can be moved and/or deleted from the various letters. The various letters can also be used as other types of informational or instruction sheets.	H
Yours truly, [SIGNATURE]	•

Second Option: Add new engagement letter.

Step 1: Click the "Add" button

Duble Window Default Add Delete	l .
[CLIENTNAME] [CLIENTADDRESS]	
[CLIENTCITY], [CLIÈNTSTATE] [CLIENTZIP] [CLIENTCOUNTRY]	
[FIRMNAME] [FIRMADDRESS] [FIRMCITYSTATE] [FIRMZIP]	•

<u>Step 2</u>: Name your engagement letter – then click okay

Edit Engagement Letter	X
Double Window Default Add Delete	
[CLIENTNAME] [CLIENTCOUN Enter new template name: Test Engagement [CLIENTCOUN Cancel [FIRMNAME] [FIRMNAME] [FIRMNAME] [FIRMNAME] [FIRMADDRESS] [FIRMCITYSTATE] [FIRMCITYSTATE]	E
Cancel	Done

<u>Step 3</u>: Customize letter add text.

<u>Step 4</u>: Once everything looks the way you want it, click "Done"

Tost Engagomo	nt Lottor		4-1-1		lata		
rest Engageme	ni Leilei		Add	De	elete		
Begin cus	tomizing your new	engagement l	etter				
Cancel							Done

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

Test Engagemer	It Letter Add Delete	
Begin cust	omizing your new engagement letter	
	Changes Not Saved	
	A Would you like to save your Engagement Letter changes?	
	Ves No	