

Intuit Link: How to Invite a New Client

There are two options to invite a new client to Link.

First Option: Invite Multiple Clients

Step 1: From your client list dashboard, highlight the clients you'd like to invite.

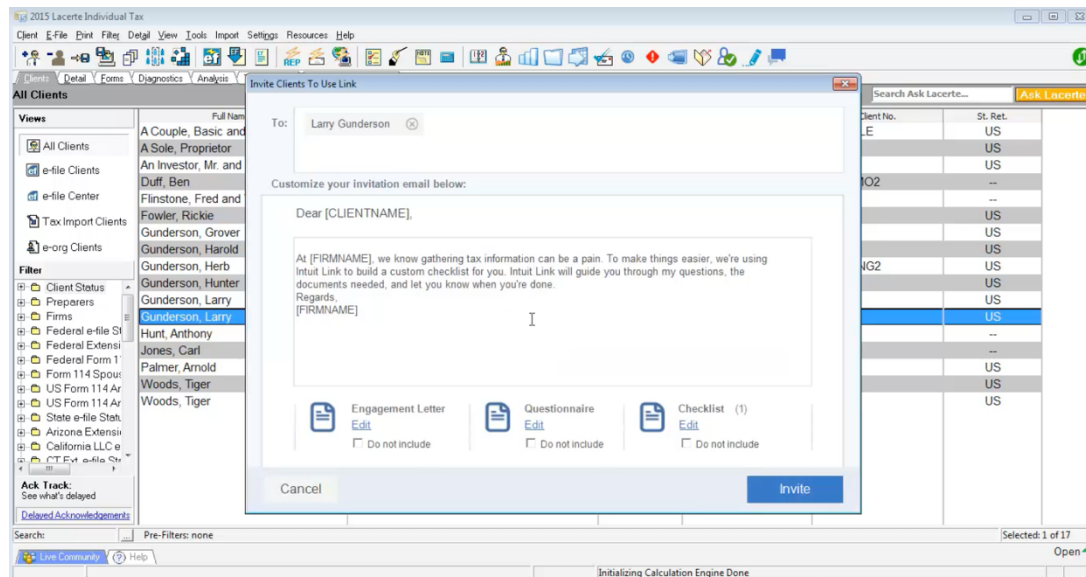
Views	Full Name (JNP)	TP E-Mail Addr.	eSig Status	Intuit Link	Client No.	St. Ret.
All Clients	A Couple, Basic and Average	sample@lacertesoftware.com	Request	Invite	03SAMPLE	US
e-file Clients	A Sole, Proprietor	clientconnectionsuite+110@gmail.com	Request	3/49	CCS110	US
e-file Center	An Investor, Mr. and Ms.		Request	Invite	CCS003	US
Tax Import Clients	Duff, Ben	clientconnectionsuitebd+115@gmail.com	Request	Completed	BENDEMO2	--
e-org Clients	Flinstone, Fred and Wilma Flintstone	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	client.connectionsuite+305@gmail.com	Request	Completed	DEMO03	US
	Gunderson, Herb	client.connectionsuite+204@gmail.com	Request	1/55	DEMOKNG2	US
	Gunderson, Hunter	client.connectionsuite+406@gmail.com	Request	Invitation Pending	NJCPA	US
	Gunderson, Larry	client.connectionsuite+411@gmail.com	Request	Invitation Pending	CCS408	US
	Gunderson, Larry	client.connectionsuite+412@gmail.com	Request	Invite	CCS412	US
	Hunt, Anthony	client.connectionsuite@gmail.com	Multiple	Invite	CCS002	--
	Jones, Carl	client.connectionsuite+300@gmail.com	Request	4/54	CCS300	--
	Palmer, Arnold	client.connectionsuite+220@gmail.com	Request	Invitation Pending	CCS201	US
	Woods, Tiger	client.connectionsuite+557@gmail.com	Request	Completed	CCS508	US
	Woods, Tiger	client.connectionsuite+527@gmail.com	Request	6/50	CCS208	US

Tip: To highlight multiple clients, press the control button on your keyboard while clicking on their name.

Step 2: Go to Tools, the scroll down to Intuit Link and select “Invite Client to Intuit Link”

TP E-Mail Addr.	eSig Status	Intuit Link	Client No.	St. Ret.
software.com	Request	Invite	03SAMPLE	US
uite+110@gmail.com	Request	3/49	CCS110	US
	Request	Invite	CCS003	US
uitebd+115@gmail.com	Request	Completed	BENDEMO2	--
uite+101@gmail.com	Multiple	Completed	CCS101	--
uite+212@gmail.com	Request	Completed	CCS205	US
uite+408@gmail.com	Request	Invitation Pending	NJCPA2	US
uite+305@gmail.com	Request	Completed	DEMO03	US
uite+204@gmail.com	Request	1/55	DEMOKNG2	US
uite+406@gmail.com	Request	Invitation Pending	NJCPA	US
uite+411@gmail.com	Request	Invitation Pending	CCS408	US
uite+412@gmail.com	Request	Invite	CCS412	US
uite@gmail.com	Multiple	Invite	CCS002	--
uite+300@gmail.com	Request	4/54	CCS300	--
uite+220@gmail.com	Request	Invitation Pending	CCS201	US
uite+557@gmail.com	Request	Completed	CCS508	US
uite+527@gmail.com	Request	6/50	CCS208	US

Step 3: The Link Invitation Wizard will appear.

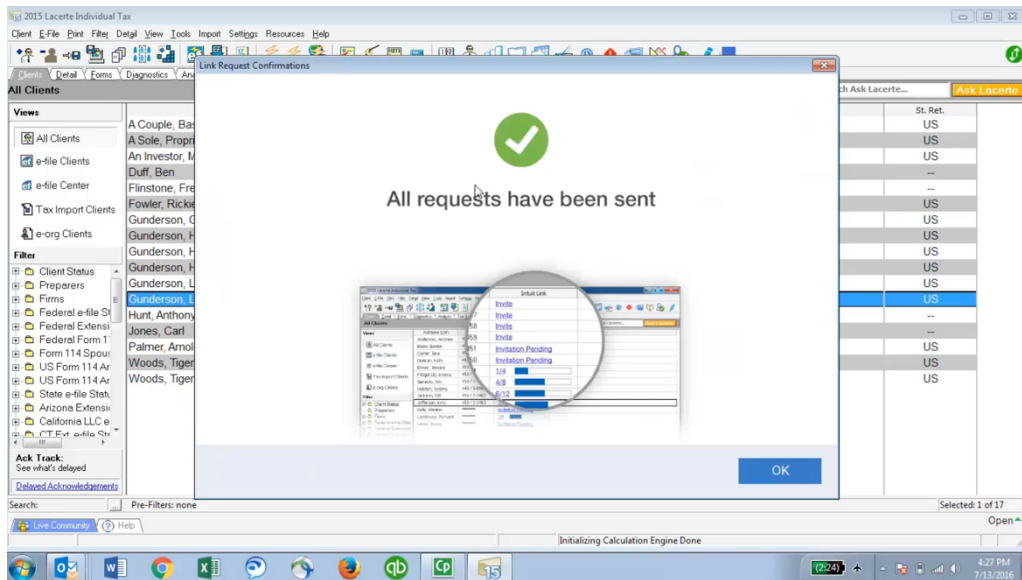


Step 4: Within the Link Invitation Wizard customize the invitation being sent to your client and edit any additional documents or select “do not include”.

- Invitation Email - place your cursor within the text box to add or delete text. You can also use the text provided. [Learn best practices](#) for sending Link invitations to clients.
- Engagement letter - include an engagement letter with your invitation by selecting “edit” to view and personalize the letter. [Learn tips](#) for using Link engagement letters effectively.
- Questionnaire – create questionnaire templates based on individual vs business returns, or both. [Create a template](#) for Link client questionnaires.
- Checklist – include a smart checklist based on your client’s prior year return. [Discover smart checklists](#) and how it works.

Step 5: Select “invite”, once you are satisfied with your invitation edits.

Step 6: You will receive a confirmation that your invitation was sent.



Tip: The Link column in your client list dashboard will display the invitation status. Once invited, the status will change to “invitation pending”, then when your client accepts your invitation to join and logs into their Link account, the status will change to “accepted.”

Second Option: Invite a Single Client

Step 1: From your client list dashboard, highlight the client you’d like to invite.

Step 2: Look for the “Intuit Link” column title, then click “invite”.

Views	Full Name (J/N/F)	TP E-Mail Addr.	eSig Status	Intuit Link	Client No.	St. Ret.
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e-file Clients	A Sole, Proprietor	clientconnectionsuite+110@gmail.com	Request	3/49	CCS110	US
Tax Import Clients	An Investor, Mr and Ms.	clientconnectionsuite+115@gmail.com	Request	Invite	CCS003	US
	Duff, Ben	clientconnectionsuitebd+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
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	Gunderson, Hunter	clientconnectionsuite+406@gmail.com	Request	Invitation Pending	NUCPA	US
	Gunderson, Larry	clientconnectionsuite+411@gmail.com	Request	Invitation Pending	CCS408	US
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	Woods, Tiger	clientconnectionsuite+527@gmail.com	Request	6/50	CCS208	US

Tip: If you do not see the Intuit Link column in your client list, check your preferences. Follow this link to [learn more](#) about setting your client list preference.