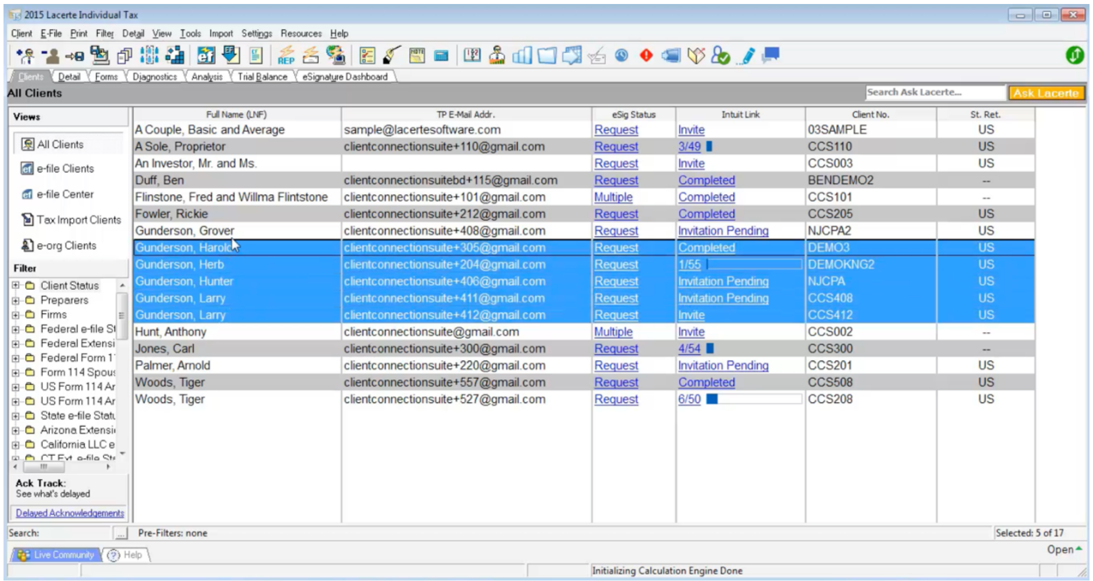
Intuit Link: How to Invite a New Client

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

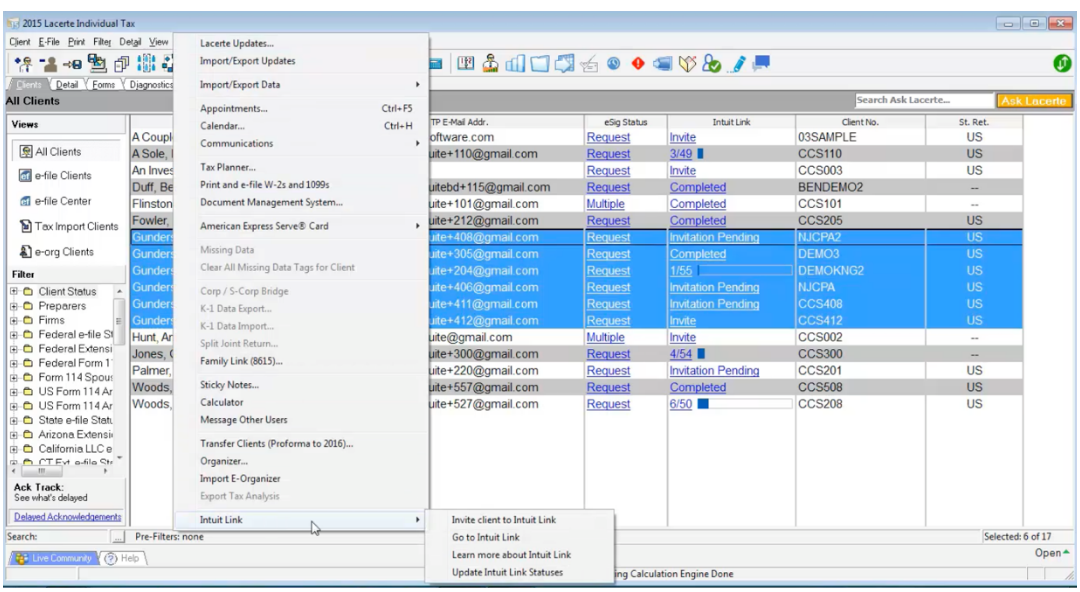
First Option: Invite Multiple Clients

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

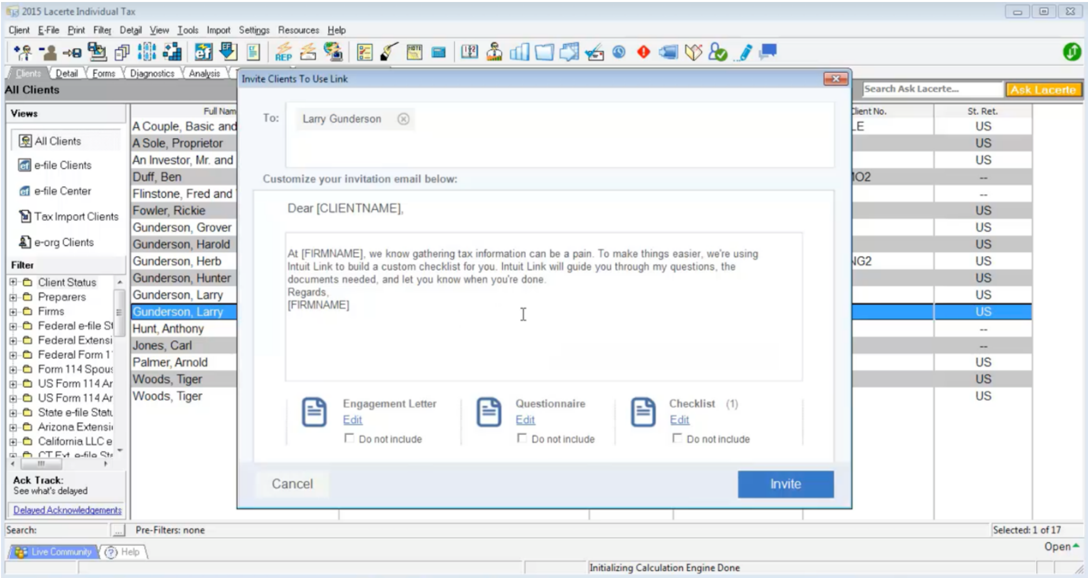


Tip: To highlight multiple clients, press the control button on your keyboard while clicking on their name.

<u>Step 2:</u> Go to Tools, the scroll down to Intuit Link and select "Invite Client to Intuit Link"



Step 3: The Link Invitation Wizard will appear.

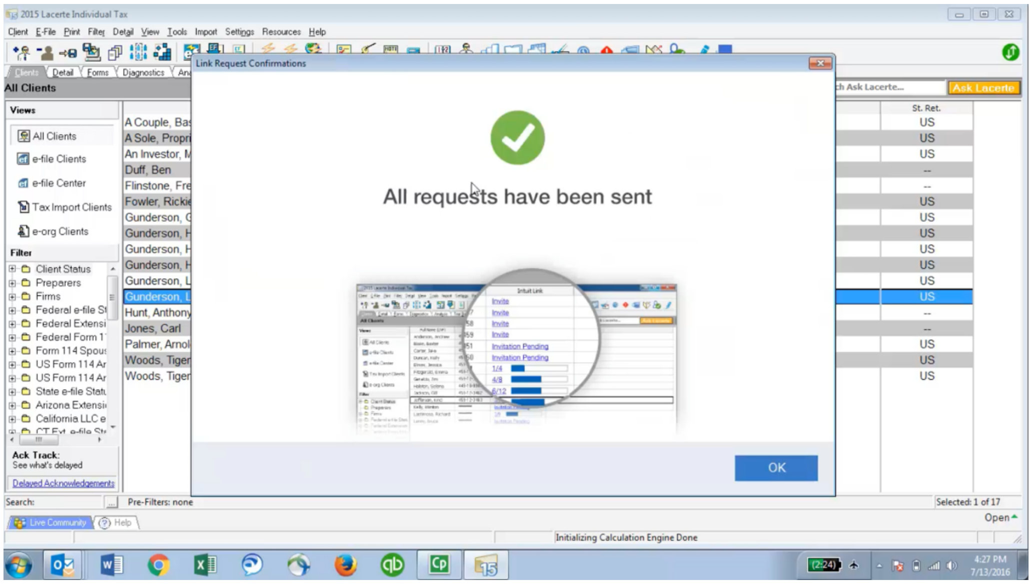


Step 4: Within the Link Invitation Wizard customize the invitation being sent to your client and edit any additional documents or select “do not include”.

- 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 invitational 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.
- Ckecklist – 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.

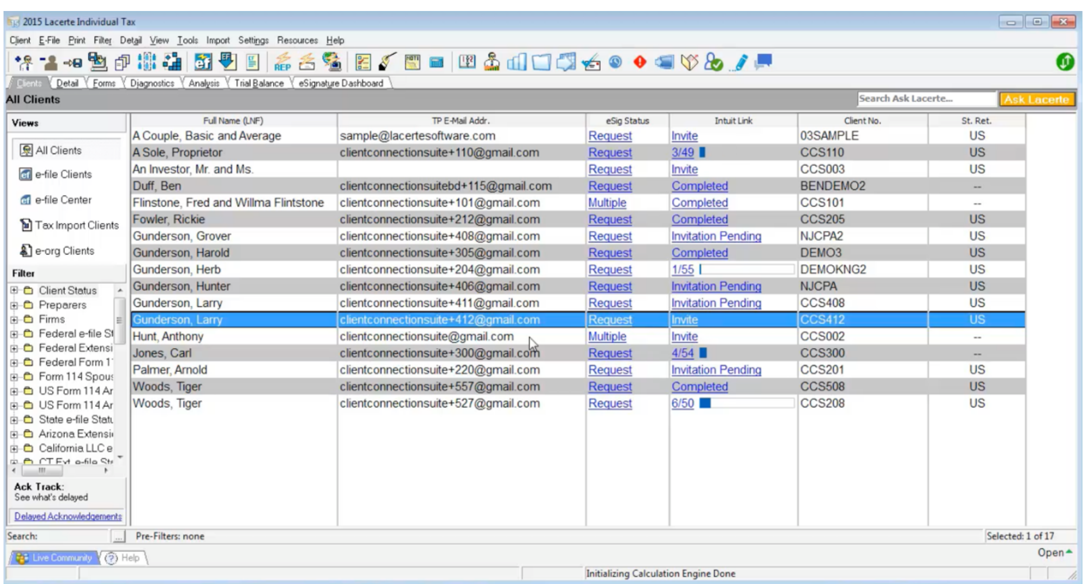


Tip: The Link column in your client list dashboard will display the invitation status. Once invited, the status will change to “invitation pending”, then when your client accepts your invitation to join and logs into their Link account, the status will change to “accepted.”

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”.



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.