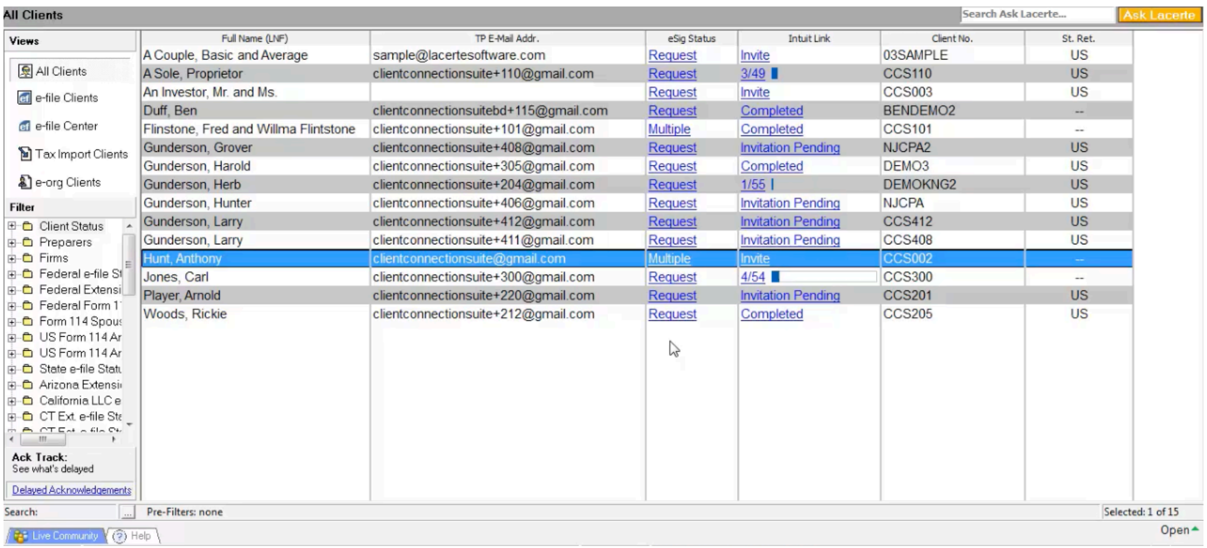
Intuit Link: How to Set-up Questionnaire Templates

Intuit Link gives you some really cool customization tools to invite your clients to use Intuit Link.

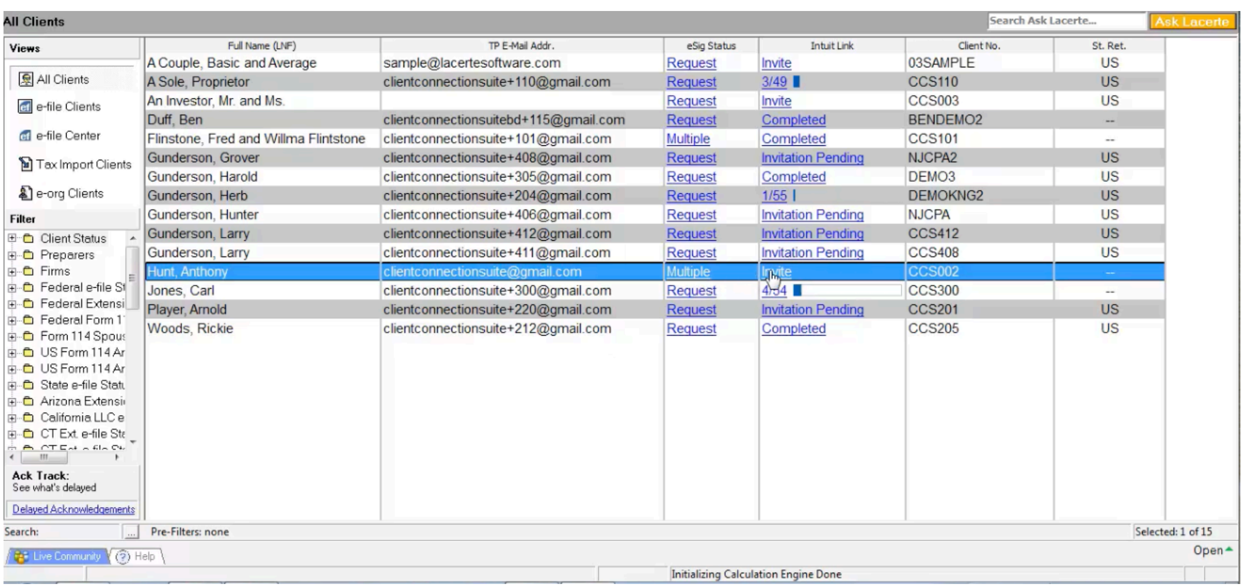
There are two options to customize your questionnaire as a part of that invitation.

First Option: Using your tools organizer, and finding your questionnaire and going through the edit process

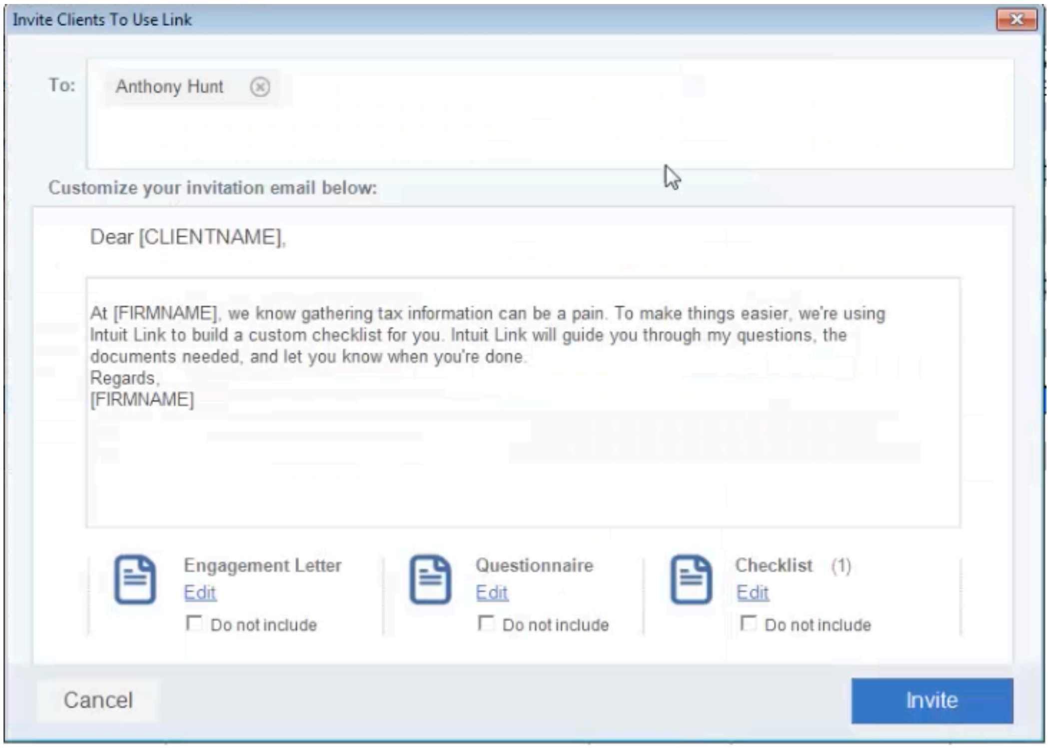
Step 1: Highlight a customer you would like to invite



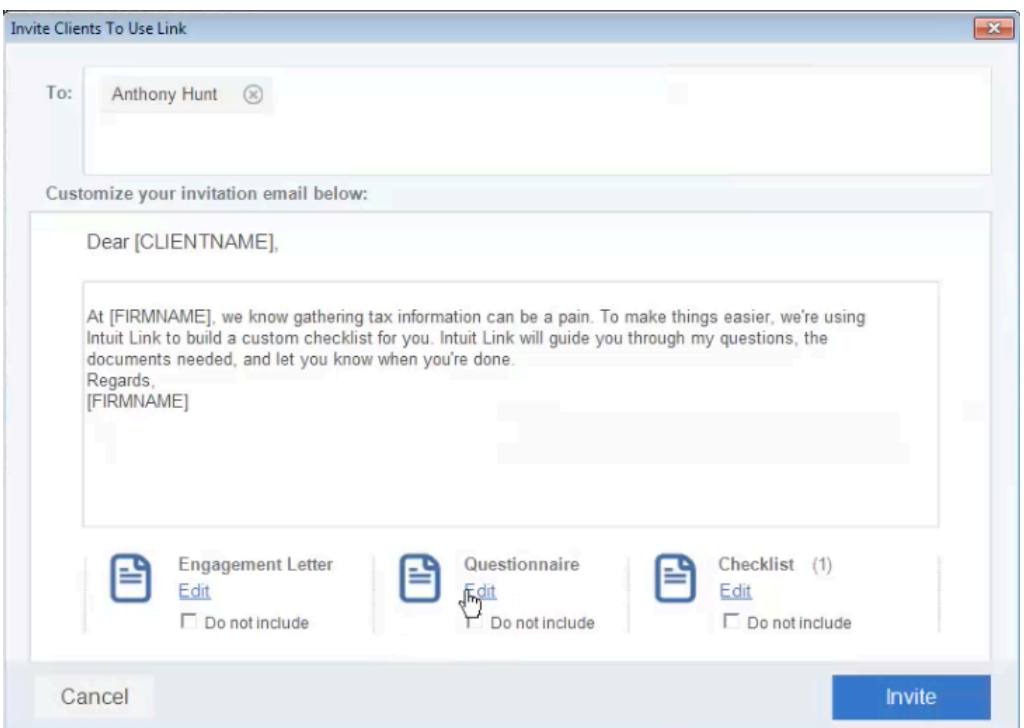
Step 2: Click the “Invite” Button



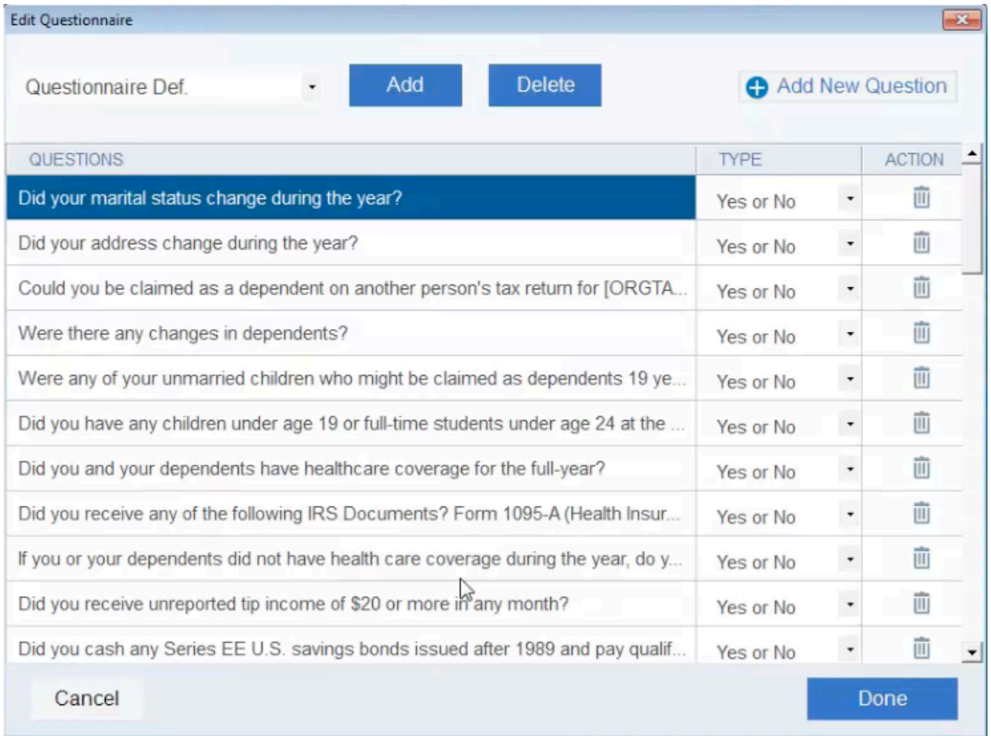
This will bring up your invite wizard.



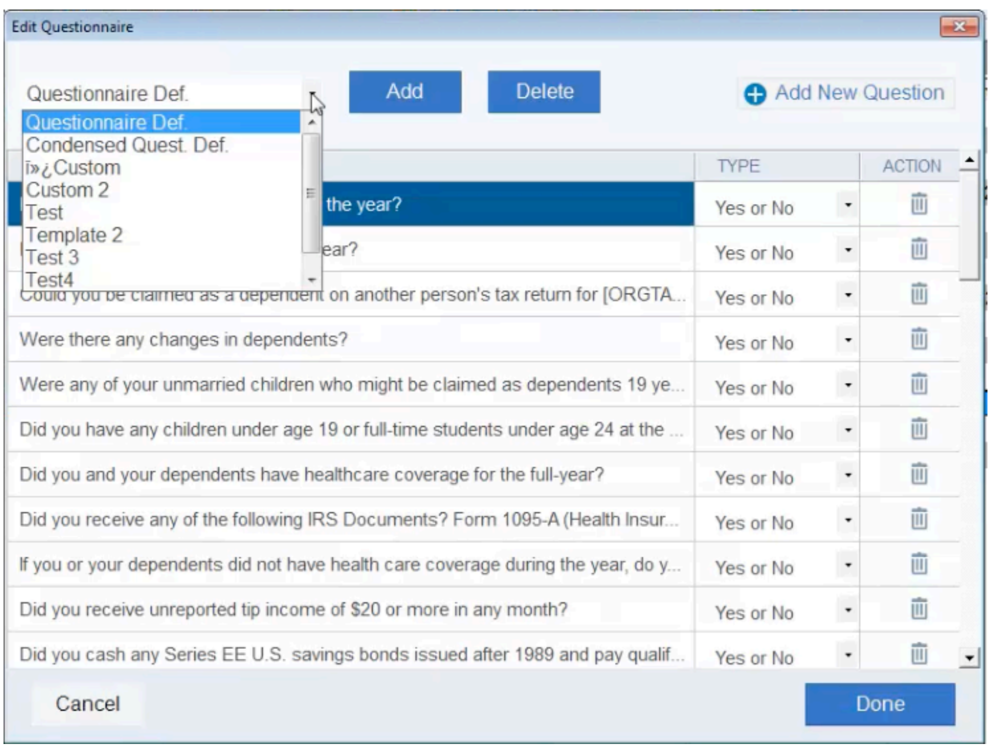
Step 3: Click on the “Edit” button under the questionnaire section.



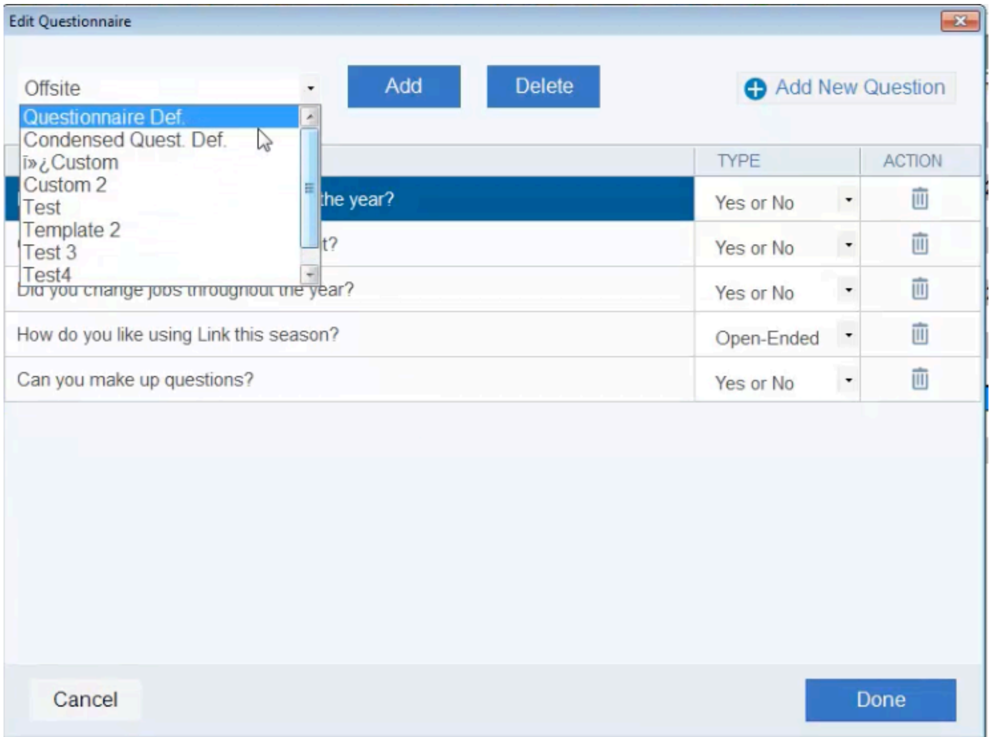
This will bring your edit questionnaire tool up.



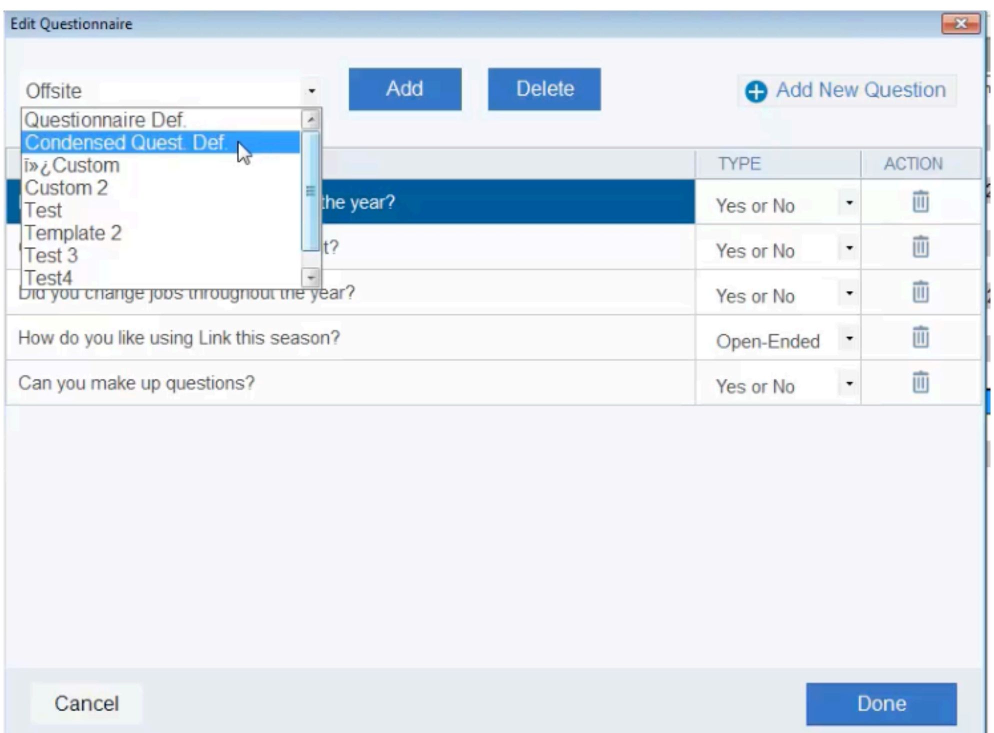
If you already have a custom questionnaire store in the prior years of Lacerte it does carry over into the program, then your custom templates will be seen in the drop down menu.



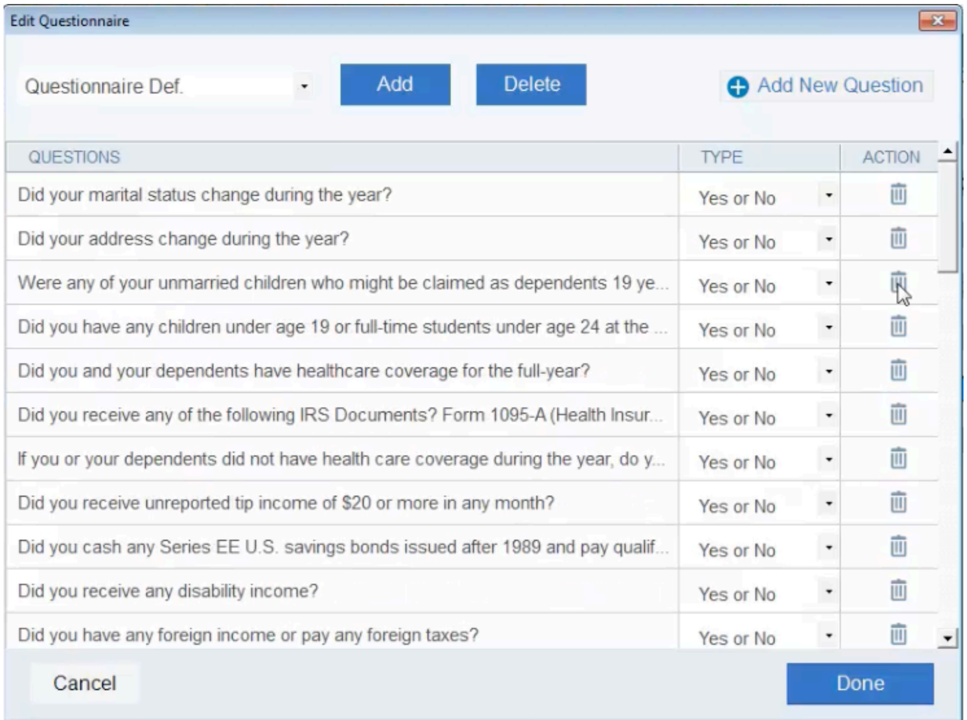
Intuit Link actually gives two default templates inside the program.
The first one is the standard questionnaire out of Lacerte – “Questionnaire Def”



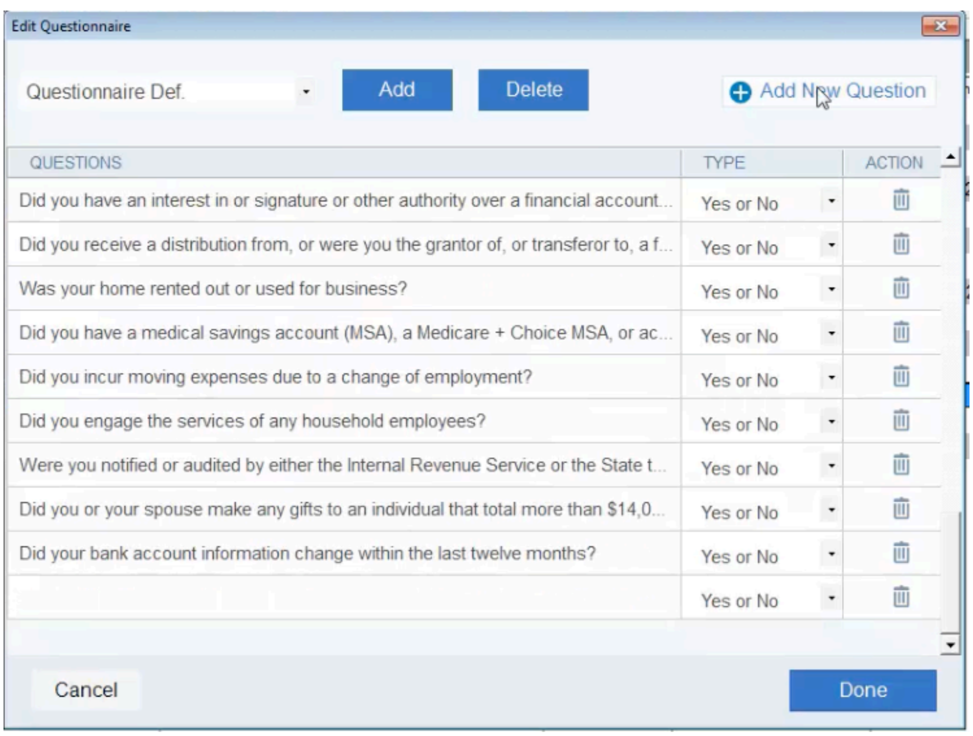
The second one is the condensed version – “Condensed Quest Def”



If you have never used these, or have always wanted to edit them in the past but haven't done it – you can simply edit them here.
To remove questions you do not like or want for whatever reason simply click the delete button.



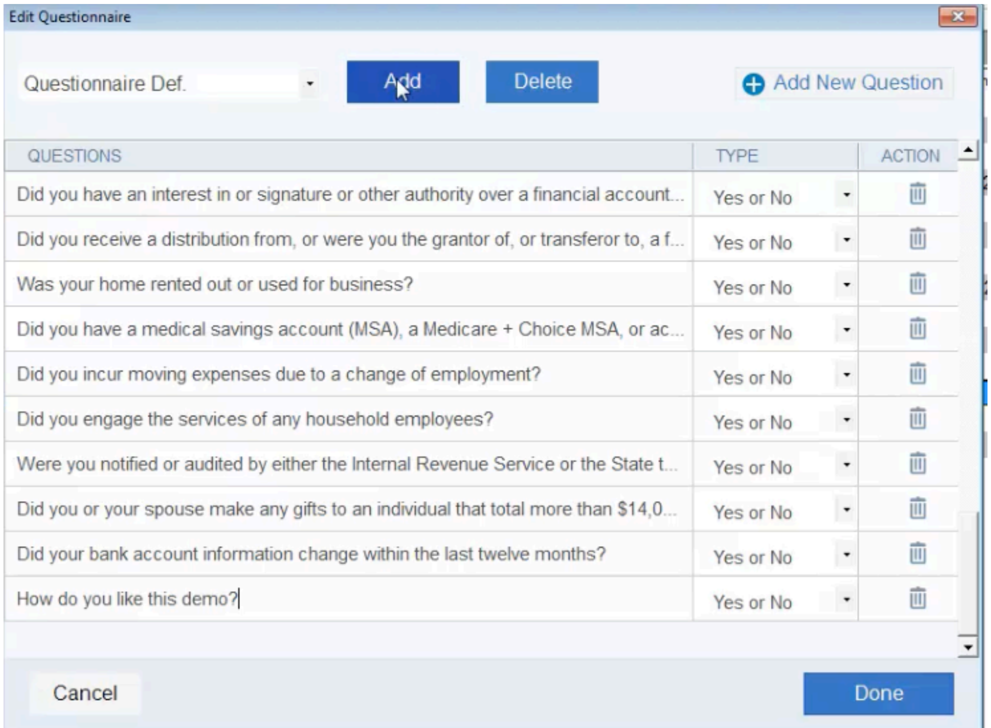
To add questions you can click the "Add New Question" button.



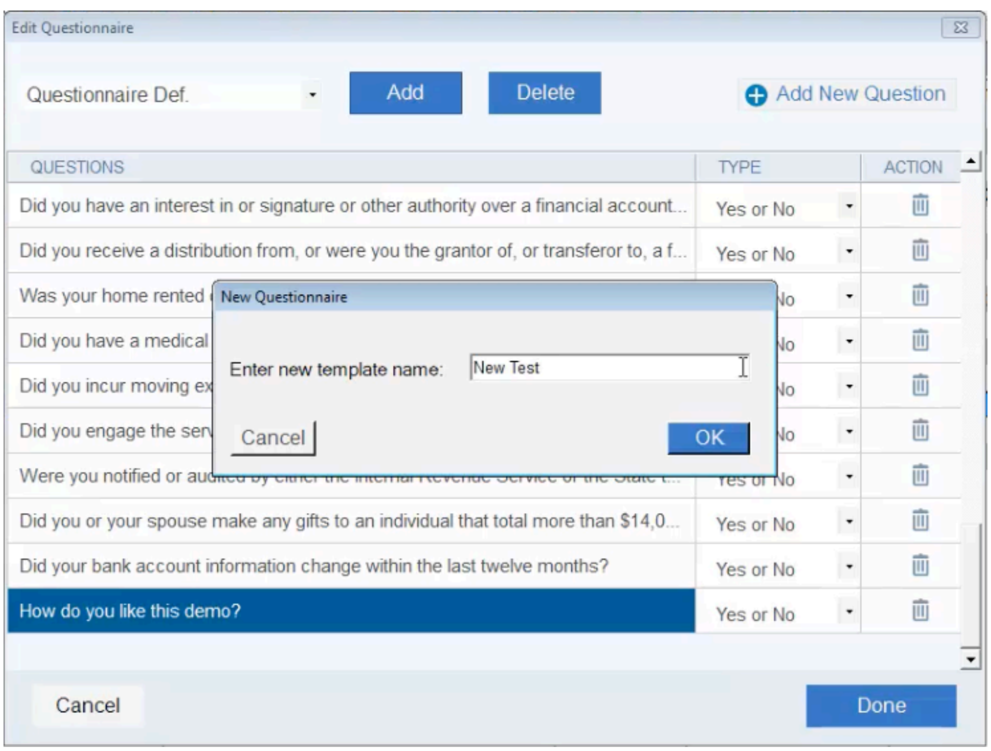
Once you add your question – click "done" button to save

Second Option: Create a new questionnaire

Step 1: Create new questionnaire by clicking the “Add” button.

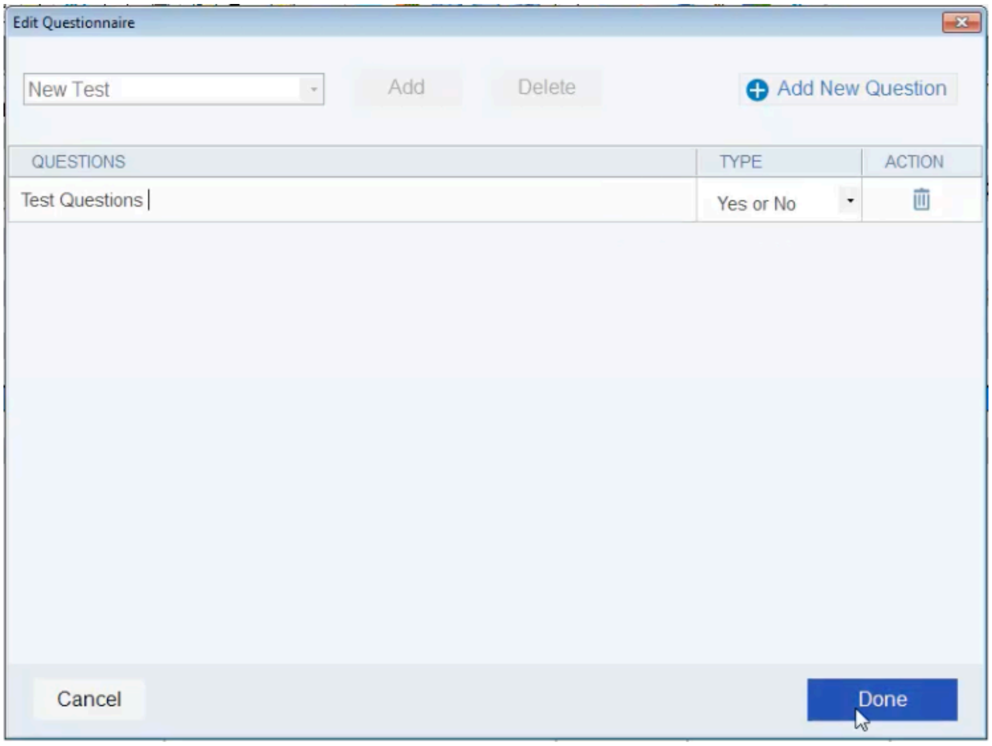


Step 2: Name your questionnaire

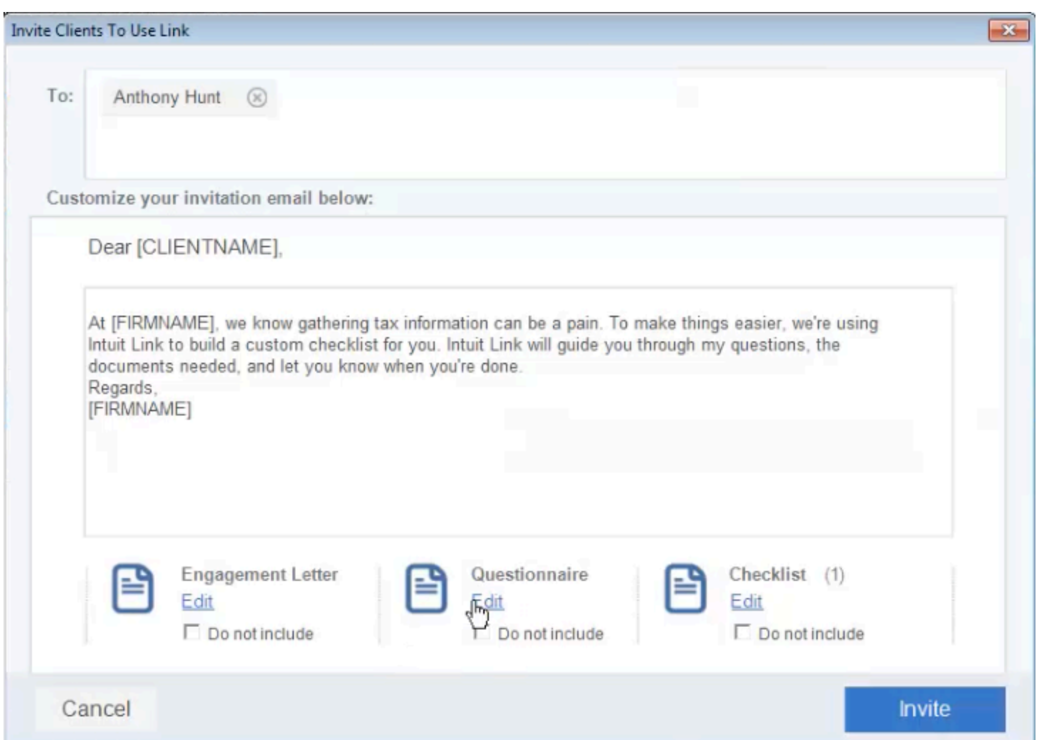


Step 3: Add new questions as desired.

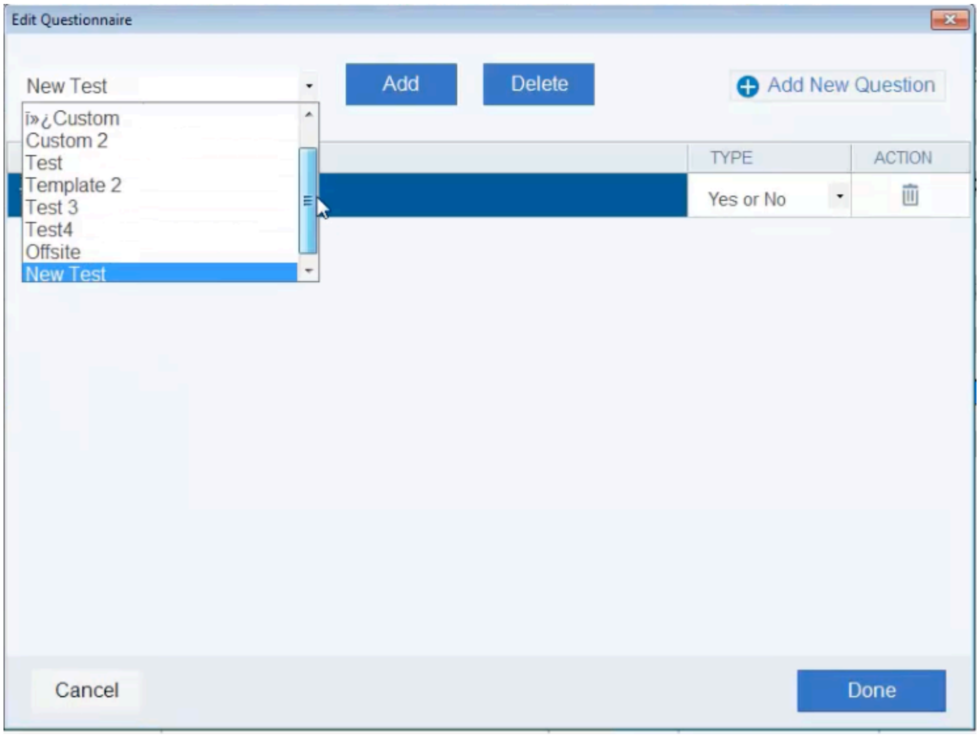
Step 4: Click “done” to save when questionnaire is the way you want it



Step 5: To get to your new custom questionnaire – click on the “edit” button under the questionnaire section.



Tip: You can easily create custom questionnaires for different clients and label them and they will be available to you via the drop down.



Once you have your questionnaire the way you want it. Simply click the “invite” button and you are on your way.