

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

Views	Full Name (LNF)	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 Willma Flintstone	clientconnectionsuite+101@gmail.com	Multiple	Completed	CCS101	--
Filter	Gunderson, Grover	clientconnectionsuite+408@gmail.com	Request	Invitation Pending	NJCPA2	US
Client Status	Gunderson, Harold	clientconnectionsuite+305@gmail.com	Request	Completed	DEMO3	US
Preparers	Gunderson, Herb	clientconnectionsuite+204@gmail.com	Request	1/55	DEMOKNG2	US
Firms	Gunderson, Hunter	clientconnectionsuite+406@gmail.com	Request	Invitation Pending	NJCPA	US
Federal e-file St	Gunderson, Larry	clientconnectionsuite+412@gmail.com	Request	Invitation Pending	CCS412	US
Federal Extensi	Gunderson, Larry	clientconnectionsuite+411@gmail.com	Request	Invitation Pending	CCS408	US
Federal Form 1	Hunt, Anthony	clientconnectionsuite@gmail.com	Multiple	Invite	CCS002	--
Form 114 Spou	Jones, Carl	clientconnectionsuite+300@gmail.com	Request	4/54	CCS300	--
US Form 114 Ar	Player, Arnold	clientconnectionsuite+220@gmail.com	Request	Invitation Pending	CCS201	US
US Form 114 Ar	Woods, Rickie	clientconnectionsuite+212@gmail.com	Request	Completed	CCS205	US

Step 2: Click the "Invite" Button

Views	Full Name (LNF)	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 Willma Flintstone	clientconnectionsuite+101@gmail.com	Multiple	Completed	CCS101	--
Filter	Gunderson, Grover	clientconnectionsuite+408@gmail.com	Request	Invitation Pending	NJCPA2	US
Client Status	Gunderson, Harold	clientconnectionsuite+305@gmail.com	Request	Completed	DEMO3	US
Preparers	Gunderson, Herb	clientconnectionsuite+204@gmail.com	Request	1/55	DEMOKNG2	US
Firms	Gunderson, Hunter	clientconnectionsuite+406@gmail.com	Request	Invitation Pending	NJCPA	US
Federal e-file St	Gunderson, Larry	clientconnectionsuite+412@gmail.com	Request	Invitation Pending	CCS412	US
Federal Extensi	Gunderson, Larry	clientconnectionsuite+411@gmail.com	Request	Invitation Pending	CCS408	US
Federal Form 1	Hunt, Anthony	clientconnectionsuite@gmail.com	Multiple	Invite	CCS002	--
Form 114 Spou	Jones, Carl	clientconnectionsuite+300@gmail.com	Request	4/54	CCS300	--
US Form 114 Ar	Player, Arnold	clientconnectionsuite+220@gmail.com	Request	Invitation Pending	CCS201	US
US Form 114 Ar	Woods, Rickie	clientconnectionsuite+212@gmail.com	Request	Completed	CCS205	US

Initializing Calculation Engine Done

This will bring up your invite wizard.

The screenshot shows a window titled "Invite Clients To Use Link". At the top, there is a "To:" field containing "Anthony Hunt" with a close icon. Below this is a section titled "Customize your invitation email below:". The email content is displayed in a text area, starting 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]". Below the text area are three document icons with labels and "Do not include" checkboxes: "Engagement Letter" (with an "Edit" link), "Questionnaire" (with an "Edit" link), and "Checklist (1)" (with an "Edit" link). At the bottom of the window are "Cancel" and "Invite" buttons.

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

This screenshot is identical to the previous one, but a mouse cursor is pointing at the "Edit" link under the "Questionnaire" section, indicating the step being performed.

This will bring your edit questionnaire tool up.

The screenshot shows the 'Edit Questionnaire' window. At the top, there is a 'Questionnaire Def.' dropdown menu, 'Add' and 'Delete' buttons, and an 'Add New Question' button. Below this is a table with three columns: 'QUESTIONS', 'TYPE', and 'ACTION'. The table contains several rows of questions, each with a 'Yes or No' type and a trash icon in the 'ACTION' column. At the bottom, there are 'Cancel' and 'Done' buttons.

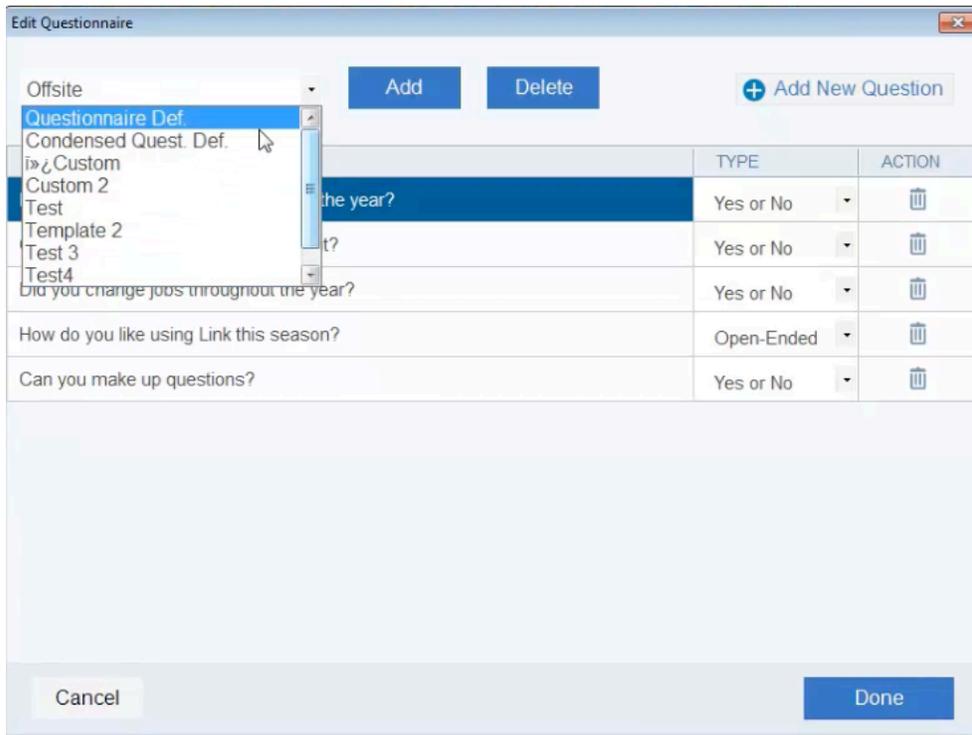
QUESTIONS	TYPE	ACTION
Did your marital status change during the year?	Yes or No	🗑️
Did your address change during the year?	Yes or No	🗑️
Could you be claimed as a dependent on another person's tax return for [ORGTA...	Yes or No	🗑️
Were there any changes in dependents?	Yes or No	🗑️
Were any of your unmarried children who might be claimed as dependents 19 ye...	Yes or No	🗑️
Did you have any children under age 19 or full-time students under age 24 at the ...	Yes or No	🗑️
Did you and your dependents have healthcare coverage for the full-year?	Yes or No	🗑️
Did you receive any of the following IRS Documents? Form 1095-A (Health Insur...	Yes or No	🗑️
If you or your dependents did not have health care coverage during the year, do y...	Yes or No	🗑️
Did you receive unreported tip income of \$20 or more in any month?	Yes or No	🗑️
Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualif...	Yes or No	🗑️

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.

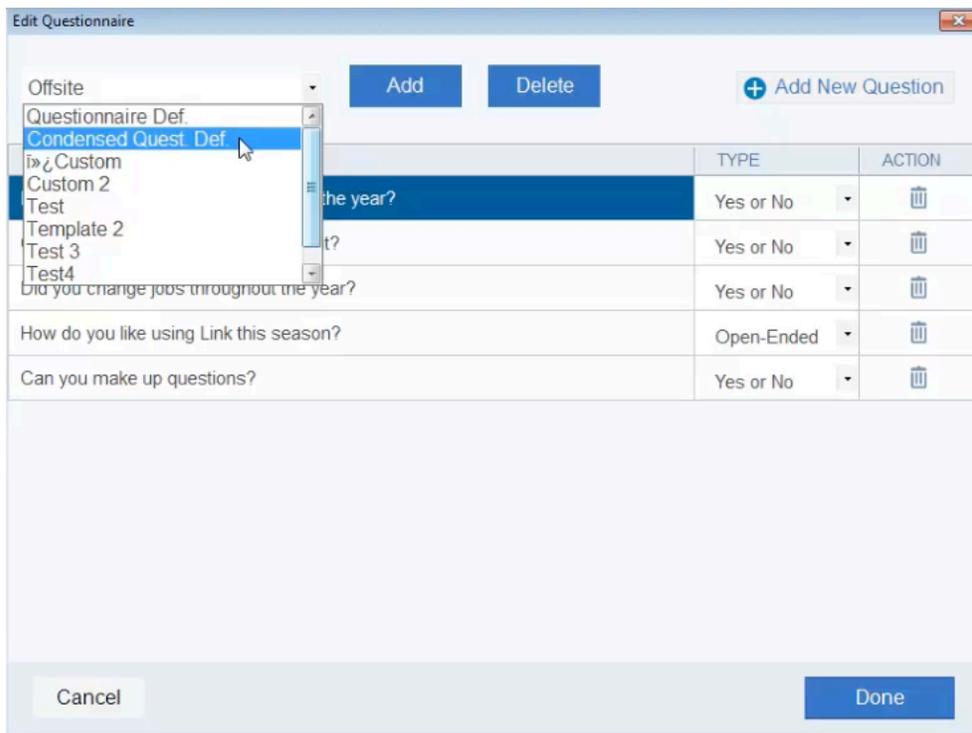
This screenshot shows the 'Edit Questionnaire' window with the 'Questionnaire Def.' dropdown menu open. The dropdown menu lists several options: 'Questionnaire Def.', 'Condensed Quest. Def.', 'Custom', 'Custom 2', 'Test', 'Template 2', 'Test 3', and 'Test4'. The 'Custom' option is currently selected. The table below the dropdown shows the same list of questions as in the previous screenshot, but the first row is partially obscured by the dropdown menu. The 'Cancel' and 'Done' buttons are visible at the bottom.

QUESTIONS	TYPE	ACTION
the year?	Yes or No	🗑️
ear?	Yes or No	🗑️
Could you be claimed as a dependent on another person's tax return for [ORGTA...	Yes or No	🗑️
Were there any changes in dependents?	Yes or No	🗑️
Were any of your unmarried children who might be claimed as dependents 19 ye...	Yes or No	🗑️
Did you have any children under age 19 or full-time students under age 24 at the ...	Yes or No	🗑️
Did you and your dependents have healthcare coverage for the full-year?	Yes or No	🗑️
Did you receive any of the following IRS Documents? Form 1095-A (Health Insur...	Yes or No	🗑️
If you or your dependents did not have health care coverage during the year, do y...	Yes or No	🗑️
Did you receive unreported tip income of \$20 or more in any month?	Yes or No	🗑️
Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualif...	Yes or No	🗑️

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.

The screenshot shows the 'Edit Questionnaire' window. At the top, there is a 'Questionnaire Def.' dropdown menu, followed by 'Add' and 'Delete' buttons, and a '+ Add New Question' button. Below this is a table with three columns: 'QUESTIONS', 'TYPE', and 'ACTION'. The table contains 11 rows of questions, each with a 'Yes or No' type and a trash can icon in the 'ACTION' column. At the bottom, there are 'Cancel' and 'Done' buttons.

QUESTIONS	TYPE	ACTION
Did your marital status change during the year?	Yes or No	🗑️
Did your address change during the year?	Yes or No	🗑️
Were any of your unmarried children who might be claimed as dependents 19 ye...	Yes or No	🗑️
Did you have any children under age 19 or full-time students under age 24 at the ...	Yes or No	🗑️
Did you and your dependents have healthcare coverage for the full-year?	Yes or No	🗑️
Did you receive any of the following IRS Documents? Form 1095-A (Health Insur...	Yes or No	🗑️
If you or your dependents did not have health care coverage during the year, do y...	Yes or No	🗑️
Did you receive unreported tip income of \$20 or more in any month?	Yes or No	🗑️
Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualif...	Yes or No	🗑️
Did you receive any disability income?	Yes or No	🗑️
Did you have any foreign income or pay any foreign taxes?	Yes or No	🗑️

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

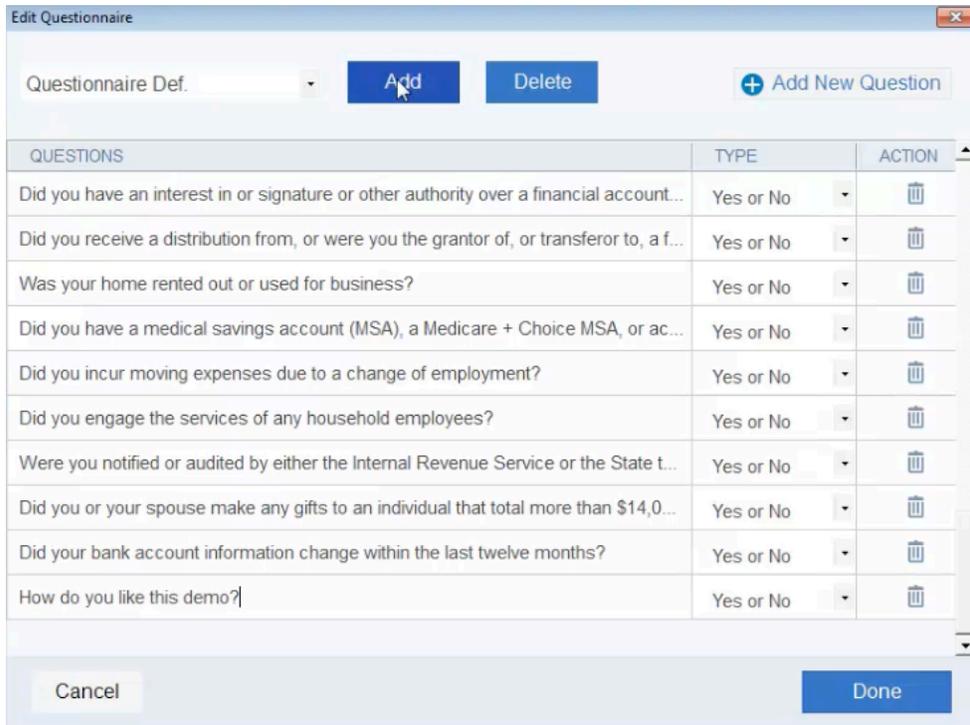
The screenshot shows the 'Edit Questionnaire' window. At the top, there is a 'Questionnaire Def.' dropdown menu, followed by 'Add' and 'Delete' buttons, and a '+ Add New Question' button. Below this is a table with three columns: 'QUESTIONS', 'TYPE', and 'ACTION'. The table contains 9 rows of questions, each with a 'Yes or No' type and a trash can icon in the 'ACTION' column. At the bottom, there are 'Cancel' and 'Done' buttons.

QUESTIONS	TYPE	ACTION
Did you have an interest in or signature or other authority over a financial account...	Yes or No	🗑️
Did you receive a distribution from, or were you the grantor of, or transferor to, a f...	Yes or No	🗑️
Was your home rented out or used for business?	Yes or No	🗑️
Did you have a medical savings account (MSA), a Medicare + Choice MSA, or ac...	Yes or No	🗑️
Did you incur moving expenses due to a change of employment?	Yes or No	🗑️
Did you engage the services of any household employees?	Yes or No	🗑️
Were you notified or audited by either the Internal Revenue Service or the State t...	Yes or No	🗑️
Did you or your spouse make any gifts to an individual that total more than \$14,0...	Yes or No	🗑️
Did your bank account information change within the last twelve months?	Yes or No	🗑️
	Yes or No	🗑️

Once you add your question – click “done” button to save

Second Option: Create a new questionnaire

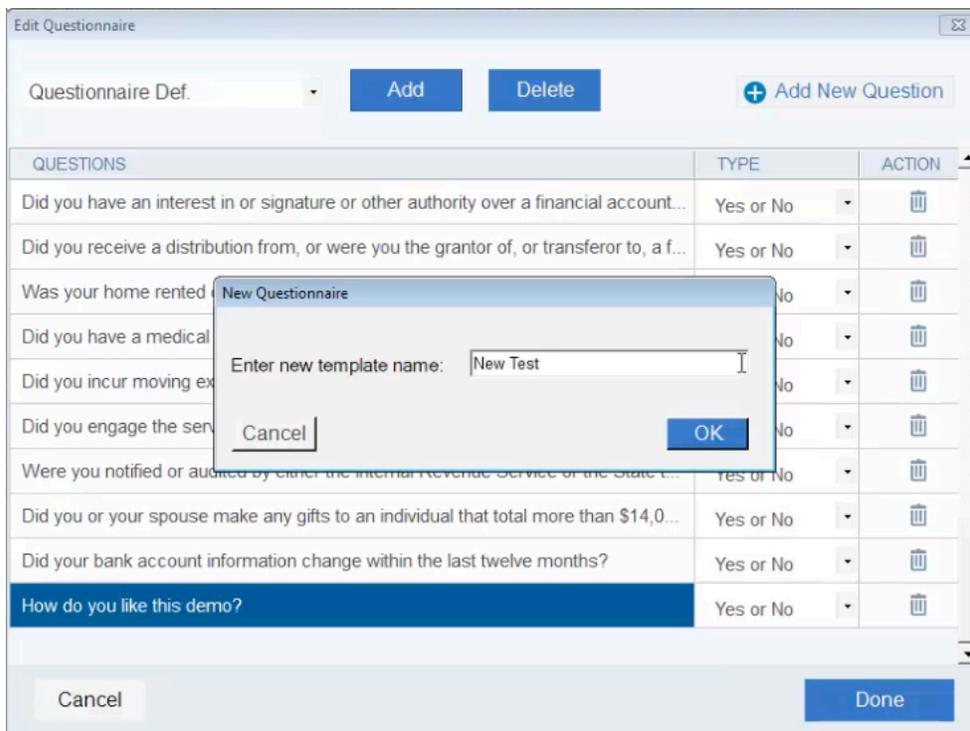
Step 1: Create new questionnaire by clicking the “Add” button.



The screenshot shows the 'Edit Questionnaire' window. At the top, there is a 'Questionnaire Def.' dropdown menu, an 'Add' button (with a mouse cursor over it), a 'Delete' button, and an '+ Add New Question' button. Below this is a table with three columns: 'QUESTIONS', 'TYPE', and 'ACTION'. The table contains ten rows of questions, each with a 'Yes or No' type and a trash icon in the 'ACTION' column. At the bottom of the window, there are 'Cancel' and 'Done' buttons.

QUESTIONS	TYPE	ACTION
Did you have an interest in or signature or other authority over a financial account...	Yes or No	🗑️
Did you receive a distribution from, or were you the grantor of, or transferor to, a f...	Yes or No	🗑️
Was your home rented out or used for business?	Yes or No	🗑️
Did you have a medical savings account (MSA), a Medicare + Choice MSA, or ac...	Yes or No	🗑️
Did you incur moving expenses due to a change of employment?	Yes or No	🗑️
Did you engage the services of any household employees?	Yes or No	🗑️
Were you notified or audited by either the Internal Revenue Service or the State t...	Yes or No	🗑️
Did you or your spouse make any gifts to an individual that total more than \$14,0...	Yes or No	🗑️
Did your bank account information change within the last twelve months?	Yes or No	🗑️
How do you like this demo?	Yes or No	🗑️

Step 2: Name your questionnaire



The screenshot shows the 'Edit Questionnaire' window with a 'New Questionnaire' dialog box open. The dialog box has a title bar 'New Questionnaire' and a text input field labeled 'Enter new template name:' with the text 'New Test' entered. There are 'Cancel' and 'OK' buttons in the dialog box. The background window is the same as in the previous screenshot, but the 'Add' button is no longer highlighted.

QUESTIONS	TYPE	ACTION
Did you have an interest in or signature or other authority over a financial account...	Yes or No	🗑️
Did you receive a distribution from, or were you the grantor of, or transferor to, a f...	Yes or No	🗑️
Was your home rented	No	🗑️
Did you have a medical	No	🗑️
Did you incur moving ex	No	🗑️
Did you engage the ser	No	🗑️
Were you notified or audited by either the Internal Revenue Service or the State t...	Yes or No	🗑️
Did you or your spouse make any gifts to an individual that total more than \$14,0...	Yes or No	🗑️
Did your bank account information change within the last twelve months?	Yes or No	🗑️
How do you like this demo?	Yes or No	🗑️

Step 3: Add new questions as desired.

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

The screenshot shows a window titled "Edit Questionnaire". At the top, there is a dropdown menu set to "New Test", followed by "Add" and "Delete" buttons, and a blue button with a plus sign labeled "Add New Question". Below this is a table with three columns: "QUESTIONS", "TYPE", and "ACTION". The first row contains "Test Questions", "Yes or No", and a trash icon. The rest of the table is empty. At the bottom, there are "Cancel" and "Done" buttons.

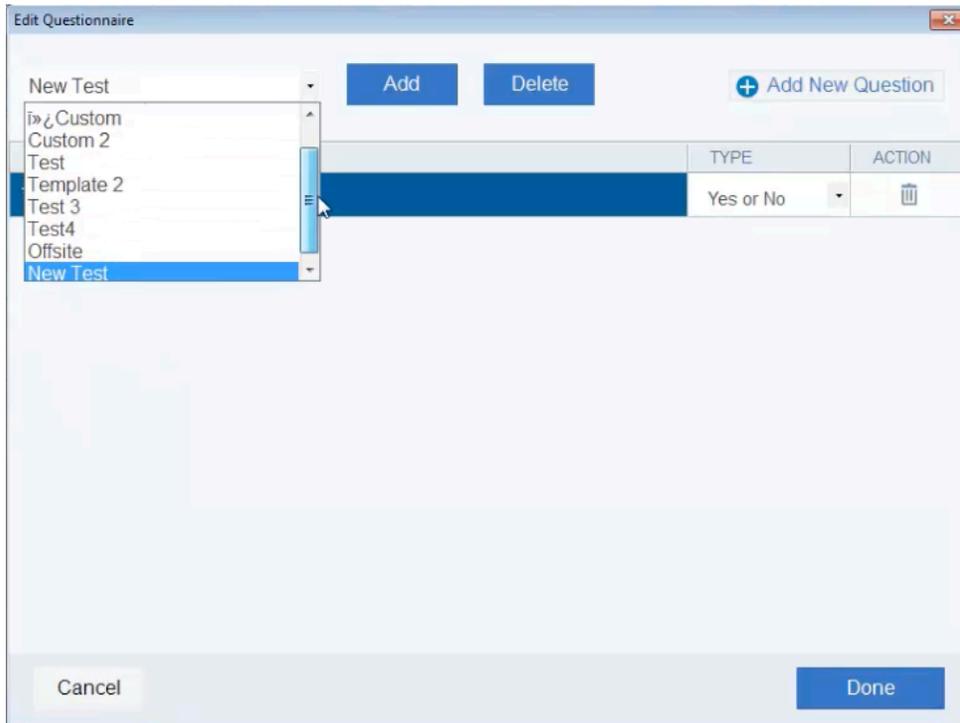
QUESTIONS	TYPE	ACTION
Test Questions	Yes or No	

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

The screenshot shows a window titled "Invite Clients To Use Link". It has a "To:" field with "Anthony Hunt" and a close icon. Below is a section "Customize your invitation email below:" containing a text area with the following content: "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]". At the bottom, there are three document icons with labels: "Engagement Letter" (with an "Edit" link and a "Do not include" checkbox), "Questionnaire" (with an "Edit" link and a "Do not include" checkbox), and "Checklist (1)" (with an "Edit" link and a "Do not include" checkbox). The "Questionnaire" "Edit" link is highlighted with a mouse cursor. At the bottom, there are "Cancel" and "Invite" buttons.

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.

