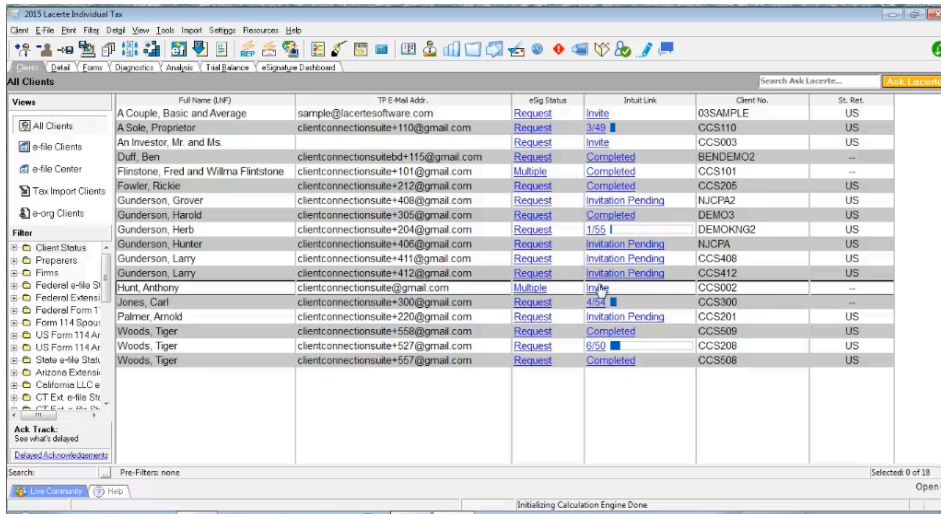


## Intuit Link: How to Set-up Email Templates

When using Intuit Link it's important to invite your customers to use Link. With that comes setting up an email template as part of that invitation.

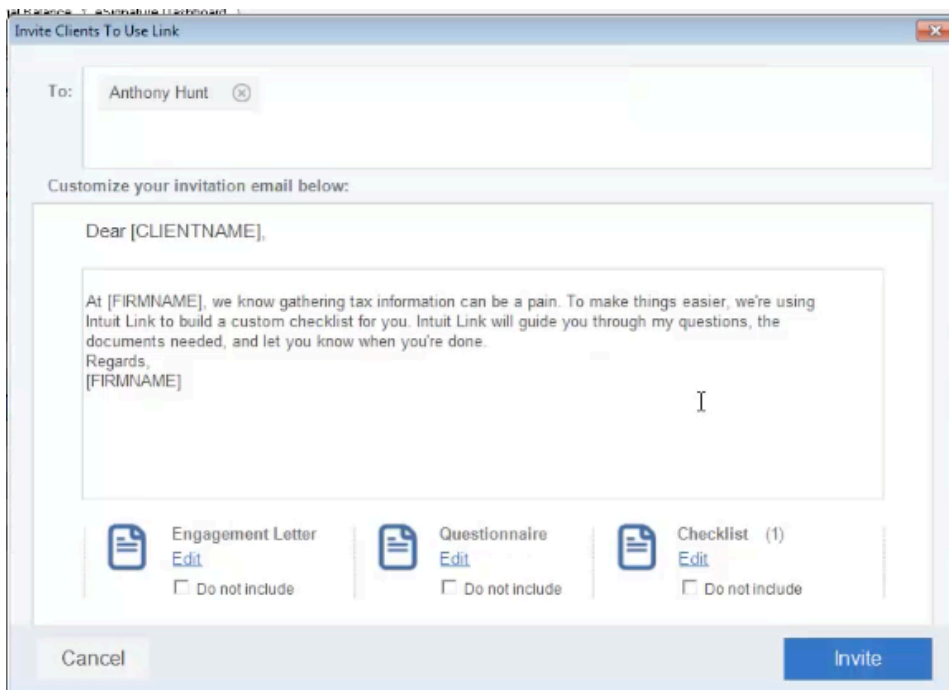
To set-up email templates you follow these easy steps.

### Step 1: Click the "Invite" button



Full Name (M/F)	TFE Mail Addr.	eSig Status	Intuit Link	Client No.	St. Ret.
A Couple, Basic and Average	sample@lacertesoftware.com	Request	Invite	03SAMPLE	US
A Sole, Proprietor	clientconnectionsuite+110@gmail.com	Request	3/49	CCS110	US
An Investor, Mr. and Ms.		Request	Invite	CCS003	US
Duff, Ben	clientconnectionsuitebd+115@gmail.com	Request	Completed	BENDEMO2	--
Finstone, 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	clientconnectionsuite+305@gmail.com	Request	Completed	DEMO3	US
Gunderson, Herb	clientconnectionsuite+204@gmail.com	Request	1/55	DEMOKNG2	US
Gunderson, Hunter	clientconnectionsuite+406@gmail.com	Request	Invitation Pending	NJCPA	US
Gunderson, Larry	clientconnectionsuite+411@gmail.com	Request	Invitation Pending	CCS408	US
Gunderson, Larry	clientconnectionsuite+412@gmail.com	Request	Invitation Pending	CCS412	US
Hunt, Anthony	clientconnectionsuite@gmail.com	Multiple	Invite	CCS002	--
Jones, Carl	clientconnectionsuite+300@gmail.com	Request	4/24	CCS300	--
Palmer, Arnold	clientconnectionsuite+220@gmail.com	Request	Invitation Pending	CCS201	US
Woods, Tiger	clientconnectionsuite+558@gmail.com	Request	Completed	CCS509	US
Woods, Tiger	clientconnectionsuite+527@gmail.com	Request	6/50	CCS208	US
Woods, Tiger	clientconnectionsuite+557@gmail.com	Request	Completed	CCS508	US

This will bring up the Invitation Wizard for that customer.



Invite Clients To Use Link

To: Anthony Hunt

Customize 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

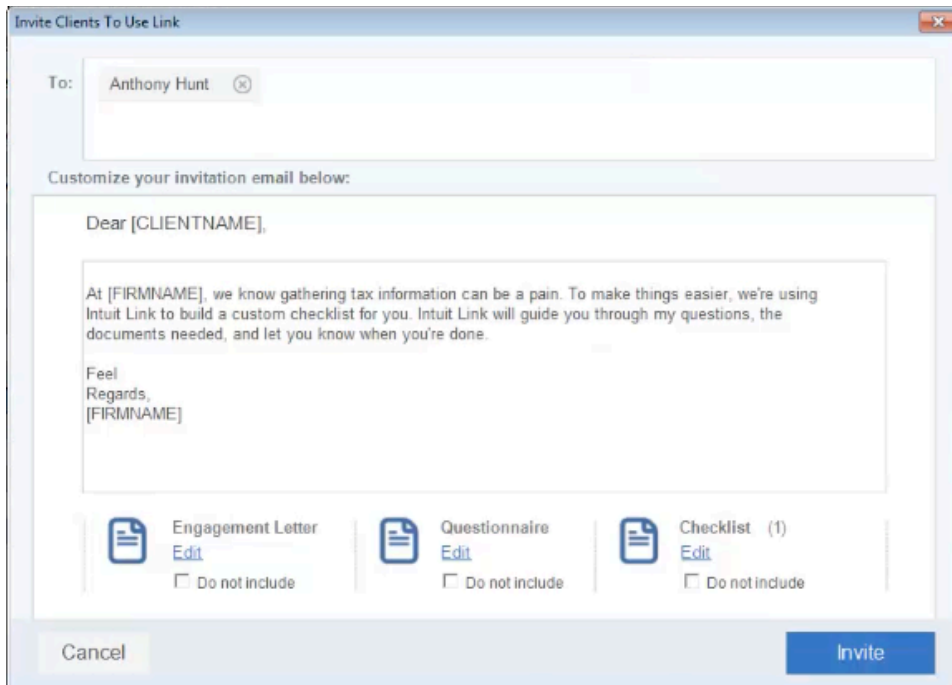
Questionnaire Edit  
 Do not include

Checklist (1) Edit  
 Do not include

Cancel Invite

Right in the middle you will see the box where you can customize your invitation email. This email will be the first experience your customer has with Link. Take time to use this as your cover letter, explaining what Intuit Link is moving forward and what they will be going through and experiencing.

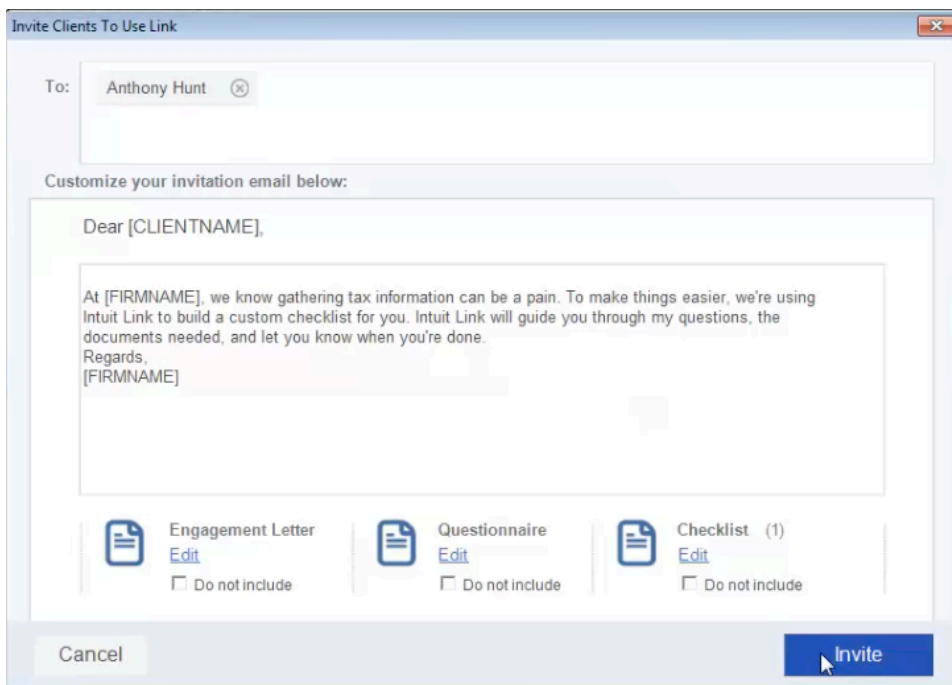
Step 2: In order to customize, simply click in the box and add or remove any text as desired.



The screenshot shows a window titled "Invite Clients To Use Link". At the top, the "To:" field contains "Anthony Hunt" with a close icon. Below this is a section titled "Customize your invitation email below:" containing a large text area. The text in the area reads: "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.  
  
Feel  
Regards,  
[FIRMNAME]"

Below the text area are three document icons with labels and checkboxes: "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). At the bottom of the window are "Cancel" and "Invite" buttons.

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



This screenshot is identical to the one above, showing the "Invite Clients To Use Link" dialog box. The text in the email customization area is the same. The only difference is that a mouse cursor is now positioned over the "Invite" button at the bottom right of the window.