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**

This will bring up the Invitation Wizard for that customer.
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.

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