Intuit Link: How to Set-up Smart Organizers / Checklists

With Intuit Link you can set-up a smart organizer or checklist. This is an auto generated documents request based on your clients prior year return.

To set-up this checklist you follow these easy steps.

<u>Step 1</u>: Highlight the customers you want to invite to connect with on Link.

Dient: <u>Detail</u> <u>Forms</u> I Clients	Diagnostics V Analysis V Trial Balance V eSignaty	re Dashboard			Countral	k Lacerte	
Clients							Ask Lacer
ïews	Full Name (LNF)	TP E-Mail Addr.	eSig Status	Intuit Link	Client No.	St. Ret.	
E un or	A Couple, Basic and Average	sample@lacertesoftware.com	Request	Invite	03SAMPLE	US	_
👰 All Clients	A Sole, Proprietor	clientconnectionsuite+110@gmail.com	Request	3/49	CCS110	US	
e-file Clients	An Investor, Mr. and Ms.		Request	Invite	CCS003	US	
	Duff, Ben	clientconnectionsuitebd+115@gmail.com	Request	Completed	BENDEMO2		
d e-file Center	Flinstone, Fred and Willma Flintstone	clientconnectionsuite+101@gmail.com	Multiple	Completed	CCS101		
Direx Import Clients	Gunderson, Grover	clientconnectionsuite+408@gmail.com	Request	Invitation Pending	NJCPA2	US	
-	Gunderson, Harold	clientconnectionsuite+305@gmail.com	Request	Completed	DEMO3	US	
e-org Clients	Gunderson, Herb	clientconnectionsuite+204@gmail.com	Request	1/55	DEMOKNG2	US	
lter	Gunderson, Hunter	clientconnectionsuite+406@gmail.com	Request	Invitation Pending	NJCPA	US	
Client Status	Gunderson, Larry	clientconnectionsuite+412@gmail.com	Request	Invitation Pending	CCS412	US	
C Preparers	Gunderson, Larry	clientconnectionsuite+411@gmail.com	Request	Invitation Pending	CCS408	US	
- E Firms	Hunt, Anthony	clientconnectionsuite@gmail.com	Multiple	Invite	CCS002		
C Federal e-file St	Jones, Carl	clientconnectionsuite+300@gmail.com	Request	4/54	CCS300	-	
E Federal Extensi	Player, Arnold	clientconnectionsuite+220@gmail.com	Request	Invitation Pending	CCS201		
Federal Form 1 Form 114 Spouse	Woods, Rickie	clientconnectionsuite+212@gmail.com	Request	Completed	CCS205		
C US Form 114 Ar							
US Form 114 Ar							
🖨 State e-file Statu							
🗅 Arizona Extensi							
🗅 California LLC e							
CT Ext e-file Ste							
III F							
ck Track:							

<u>Step 2</u>: Go to "Tools" then "Intuit Link" in the drop down menu, then "Invite client to Intuit Link"

lients									
lients		Appointments	Ctrl+F5				Search As	Lacerte	Ask Lacert
rs 🛛		Calendar	Ctrl+H	TP E-Mail Addr.	eSig Status	Intuit Link	Client No.	St. Ret.	
	A Coupl	Communications		oftware.com	Request	Invite	03SAMPLE	US	
	A Sole, I			uite+110@gmail.com	Request	3/49	CCS110	US	
e-file Cilents E	An Inves	Tax Planner			Request	Invite	CCS003	US	
	Duff, Be	Print and e-file W-2s and 1099s		uitebd+115@gmail.com	Request	Completed	BENDEMO2		
e-file Center	Flinston	Document Management System		uite+101@gmail.com	Multiple	Completed	CCS101		
Tax Import Clients	Gunder:	American Express Serve® Card		uite+408@gmail.com	Request	Invitation Pending	NJCPA2	US	
	Gunders			uite+305@gmail.com	Request	Completed	DEMO3	US	
e-org Clients	Gunders	Missing Data		uite+204@gmail.com	Request	1/55	DEMOKNG2	US	
	Gunders	Clear All Missing Data Tags for Client		uite+406@gmail.com	Request	Invitation Pending	NJCPA	US	
Client Status *	Gunder:	Corp / S-Corp Bridge		uite+412@gmail.com	Request	Invitation Pending	CCS412	US	
Preparers	Gunder	K-1 Data Export		uite+411@gmail.com	Request	Invitation Pending	CCS408	US	
Firms _	Hunt, Ar	K-1 Data Import		uite@gmail.com	Multiple	Invite	CCS002		
	Jones, (Split Joint Return		uite+300@gmail.com		4/54			
Federal Extensi	Player, /	Family Link (8615)		uite+220@gmail.com	Request	Invitation Pending			
Federal Form 1 Form 114 Spou	Woods,	Family Link (8013)		uite+212@gmail.com		Completed	CCS205		
US Form 114 År		Sticky Notes							
US Form 114 Ar		Calculator							
State e-file Statu		Message Other Users							
Arizona Extensi		Transfer Clients (Proforma to 2016)							
California LLC e									
CT Ext. e-file Ste		Organizer							
III PALA GA CL		Import E-Organizer							
Track:		Export Tax Analysis							
what's delayed	6	Intuit Link	•	Invite client to Intuit Link					
yed Acknowledgements				Go to Intuit Link					

This will generate the Invitation Wizard.

<u>Step 3</u>: Locate the checklist in the bottom right had corner and click "Edit"

Invite Clien	ts To Use L	ink						×
To:	Rickie	Woods 🗵	Arnold Player	8	Carl Jones	\otimes	Anthony Hunt 🛞	
	Larry G	underson 🗵						
Custo	omize you	r invitation em	ail below:					
	Dear [CL	ientname],						
	Intuit Link	to build a custo s needed, and le		ou. Intu	it Link will guid		ke things easier, we're usi ough my questions, the	ng
		Engagement Edit Do not inclu	l		Questionnaire Edit Do not includ		Checklist (13)	9
Ca	ncel							Invite

This will bring up the list of clients you selected to invite to Intuit Link.

Edit Document Checklist		X
	ated for existing clients from Proforma. checklist which can be modified here.	lequest
Do not include checklist for	Rickie Woods	
CLIENTS	REQUEST	ACTION
Rickie Woods	Please provide a statement of income and expenses from Making $\ensuremath{M}\xspace.$	Ū.
Arnold Player	W2 from PGA Tour	Ū
Carl Jones		
Anthony Hunt		
Larry Gunderson		
Cancel	Do	ne

As you can see the documents requested are customized based on each clients return.

Do not include check	default checklist which can be modified here. Add New R klist for Carl Jones	equest			
CLIENTS	REQUEST	ACTION			
Rickie Woods	Please provide a statement of income and expenses from Tax Prepa	Û			
Arnold Player	Please provide a statement of income and expenses from Rental Ho	Ū			
Carl Jones	W2 from Taxpayer New York Employer	Û			
Anthony	W2 from Taxpayer California Employer	Û			
Larry Gunderson	W2 from Spouse Both State Employer				
	1098 Home Mortgage	Û			
	What is the amount of property taxes paid for each property used as				
	What is the amount of cash, check, or credit card donations you mad	前			

<u>Step 4</u>: You are now able to customize the checklist for each client. Let's say you knew Carl did not work in New York anymore, you can simply remove that item from the list by clicking the "delete" button on the right.

Do not include che	cklist for Carl Jones					
CLIENTS	REQUEST	ACTION				
Rickie Woods	Please provide a statement of income and expenses from Tax Prepa.	. 🔟				
Arnold Player	Please provide a statement of income and expenses from Rental Ho	Ē				
Carl Jones	W2 from Taxpayer New York Employer	12				
Anthony Hunt	W2 from Taxpayer California Employer	Û				
Larry Gunderson	W2 from Spouse Both State Employer					
	1098 Home Mortgage					
	What is the amount of property taxes paid for each property used as					
	What is the amount of cash, check, or credit card donations you mad					

Let's say you also know that Anthony started another job, mid-year. You can simply add to your checklist by clicking the "Add New Request" button.

	generated for existing clients from Proforma. lefault checklist which can be modified here.	Add h	low Doguest
Do not include check	Add New Request		
CLIENTS	REQUEST		ACTION
Rickie Woods	W2 from Employer		ΰ
Arnold Player			
Carl Jones			
Anthony Hunt			
Larry Gunderson			

Once you have customized your checklist and everything looks good. Simply click the "Done" Button.

Then click "Invite" and you're on your way!

e Clien	its To Use Lir	ık						
To:	Rickie V	Voods 🛞	Arnold Player	\otimes	Carl Jones	\otimes	Anthony Hunt	
	Larry Gu	inderson 🙁						
Custo	omize your	invitation em	ail below:					
	Dear [CLII	ENTNAME],						
	Intuit Link to	build a custor needed, and le		. Intui	t Link will guide		ake things easier, we're using rough my questions, the	
	2	Engagement I Edit Do not inclu	E		Questionnaire Edit Do not includ	B	Checklist (12) Edit Do not include	
Ca	ncel						le le	nvite