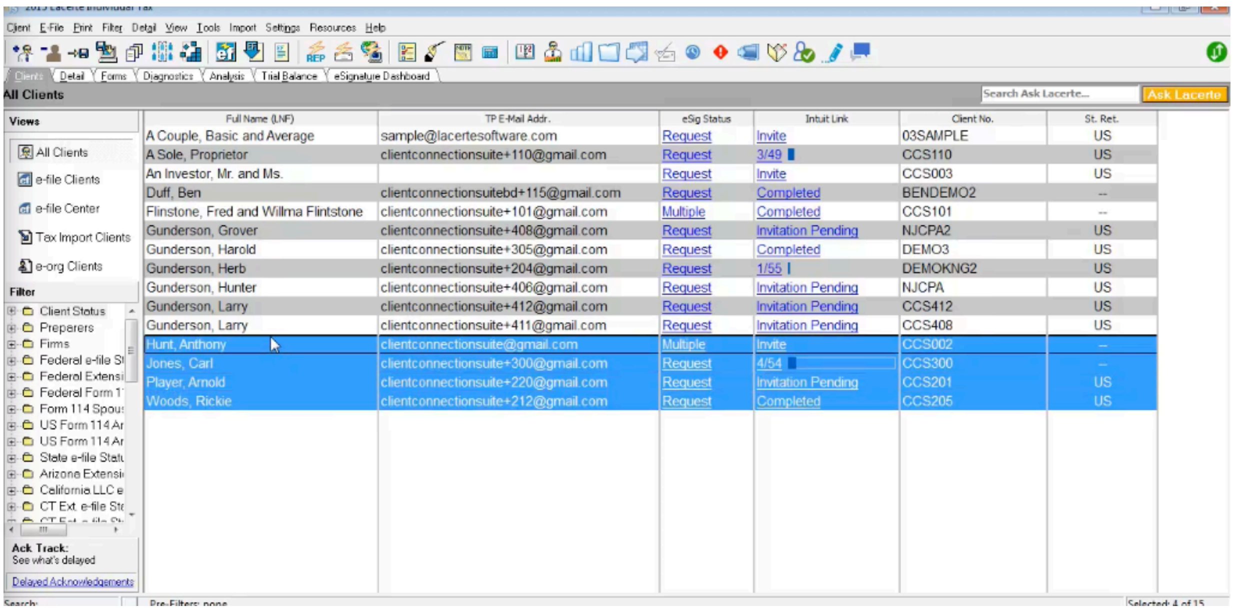
Intuit Link: How to Set-up Smart Organizers / Checklists

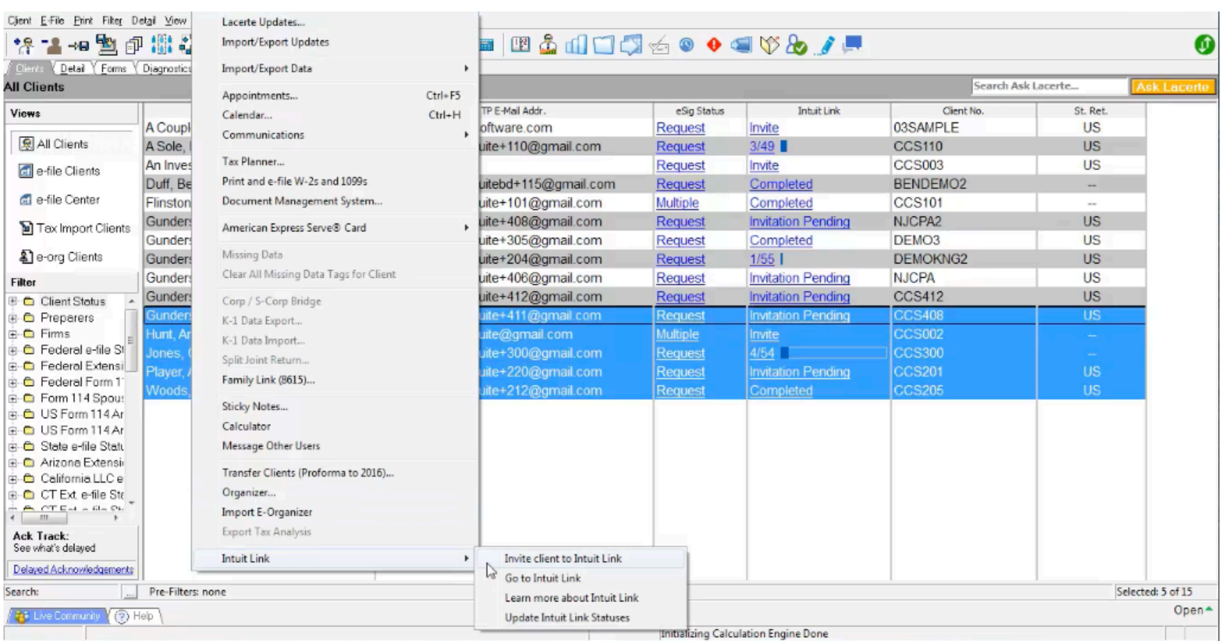
With Intuit Link you can set-up a smart organizer or checklist. This is an auto generated documents request based on your clients prior year return.

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

Step 1: Highlight the customers you want to invite to connect with on Link.

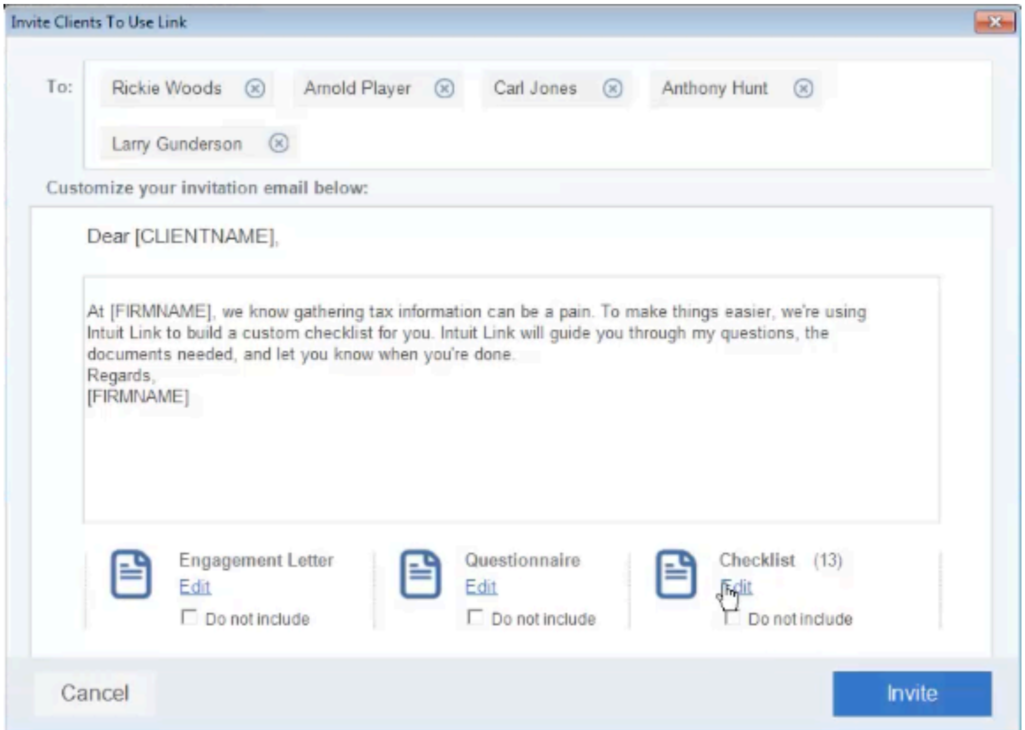


Step 2: Go to “Tools” then “Intuit Link” in the drop down menu, then “Invite client to Intuit Link”

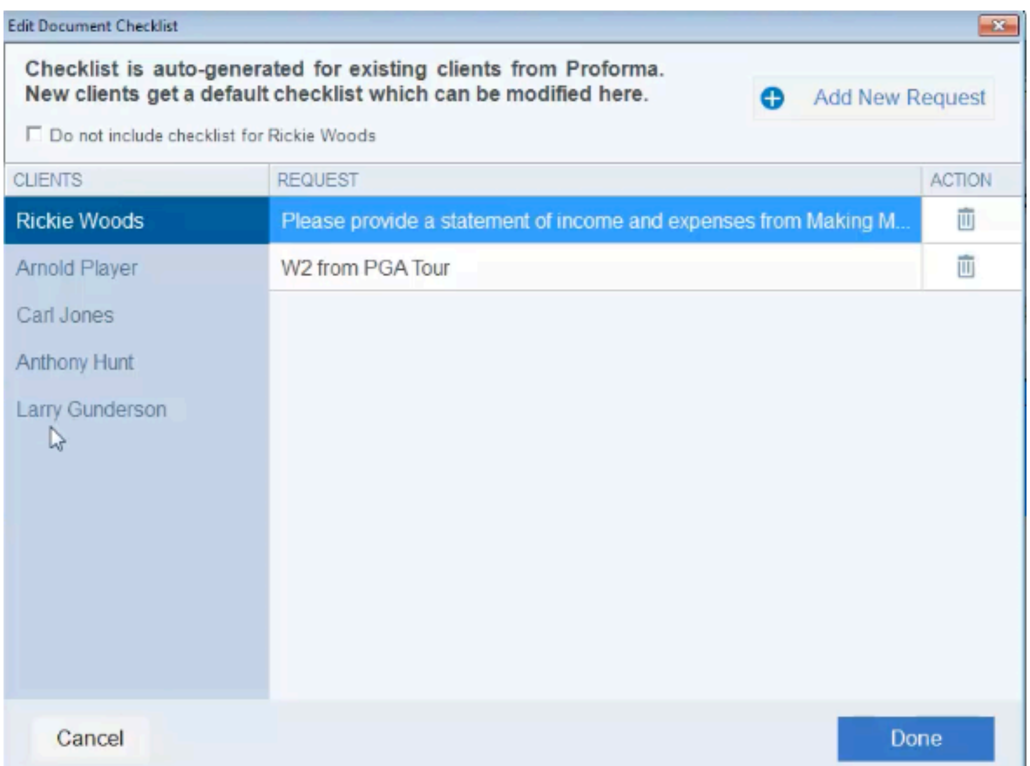


This will generate the Invitation Wizard.

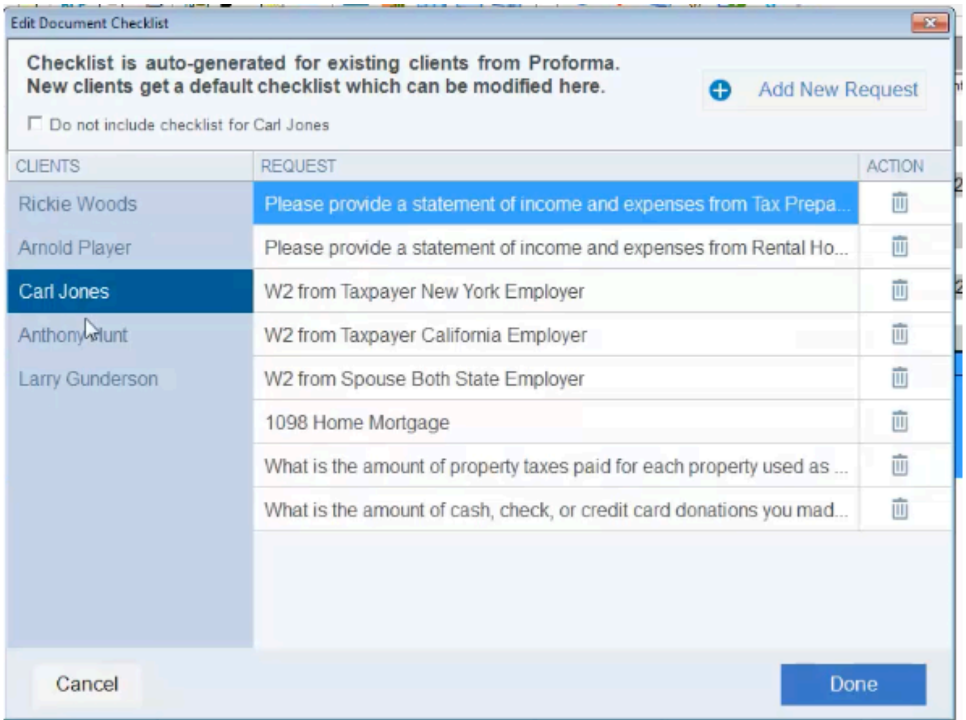
Step 3: Locate the checklist in the bottom right had corner and click "Edit"



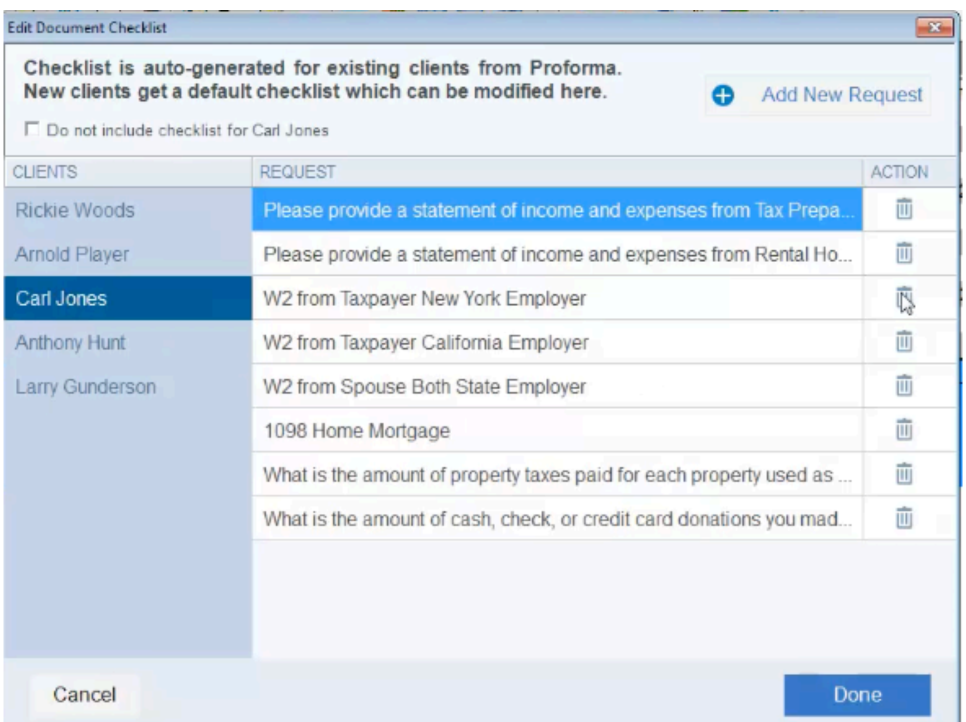
This will bring up the list of clients you selected to invite to Intuit Link.



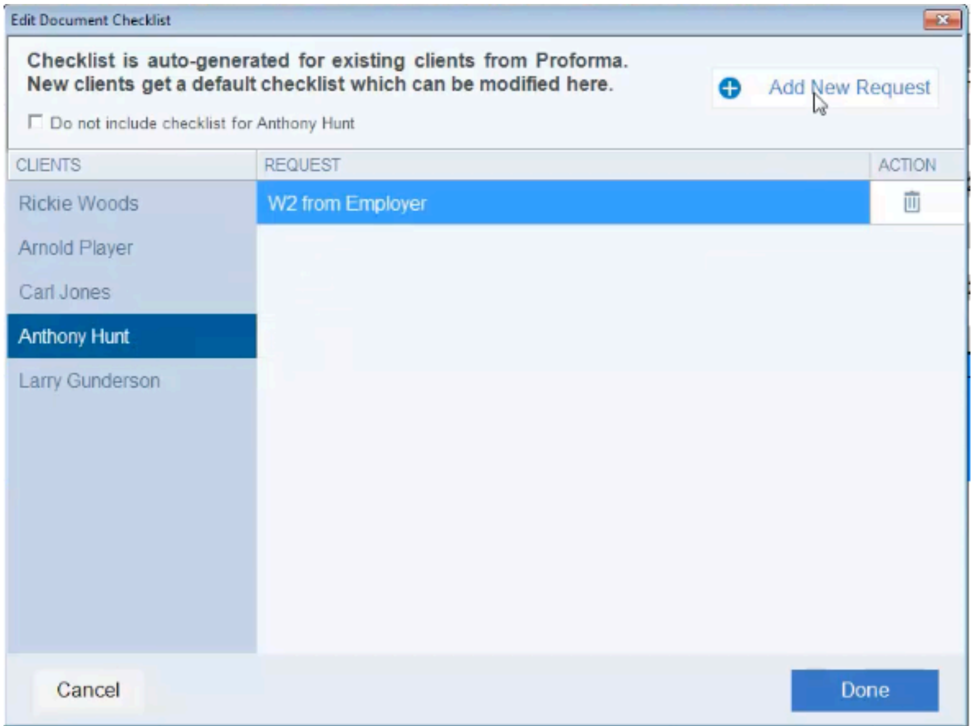
As you can see the documents requested are customized based on each clients return.



Step 4: 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.



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.



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

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