

# 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.

Full Name (LNF)	TP E-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	--
Flinstone, Fred and Willma Flinstone	clientconnectionsuite+101@gmail.com	Multiple	Completed	CCS101	--
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+412@gmail.com	Request	Invitation Pending	CCS412	US
Gunderson, Larry	clientconnectionsuite+411@gmail.com	Request	Invitation Pending	CCS408	US
Hunt, Anthony	clientconnectionsuite@gmail.com	Multiple	Invite	CCS002	--
Jones, Carl	clientconnectionsuite+300@gmail.com	Request	4/54	CCS300	--
Player, Arnold	clientconnectionsuite+220@gmail.com	Request	Invitation Pending	CCS201	US
Woods, Rickie	clientconnectionsuite+212@gmail.com	Request	Completed	CCS205	US

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

The screenshot shows the 'Tools' menu open, with 'Intuit Link' selected. The sub-menu options are:

- Invite client to Intuit Link
- Go to Intuit Link
- Learn more about Intuit Link
- Update Intuit Link Statuses

The background shows the same client list as in Step 1, with the 'Intuit Link' column highlighted in blue for the selected rows.

This will generate the Invitation Wizard.

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

**Invite Clients To Use Link**

To: Rickie Woods (x) Arnold Player (x) Carl Jones (x) Anthony Hunt (x)  
Larry Gunderson (x)

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 (13)  
[Edit](#)  
 Do not include

Cancel Invite

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

**Edit Document Checklist**

Checklist is auto-generated for existing clients from Proforma. New clients get a default checklist which can be modified here. [+ Add New Request](#)

Do not include checklist for Rickie Woods

CLIENTS	REQUEST	ACTION
Rickie Woods	Please provide a statement of income and expenses from Making M...	
Arnold Player	W2 from PGA Tour	
Carl Jones		
Anthony Hunt		
Larry Gunderson		

Cancel Done

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

**Edit Document Checklist**

Checklist is auto-generated for existing clients from Proforma. New clients get a default checklist which can be modified here. [+ Add New Request](#)

Do not include checklist 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...	
<b>Carl Jones</b>	W2 from Taxpayer New York Employer	
Anthony Hunt	W2 from Taxpayer California Employer	
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...	

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.

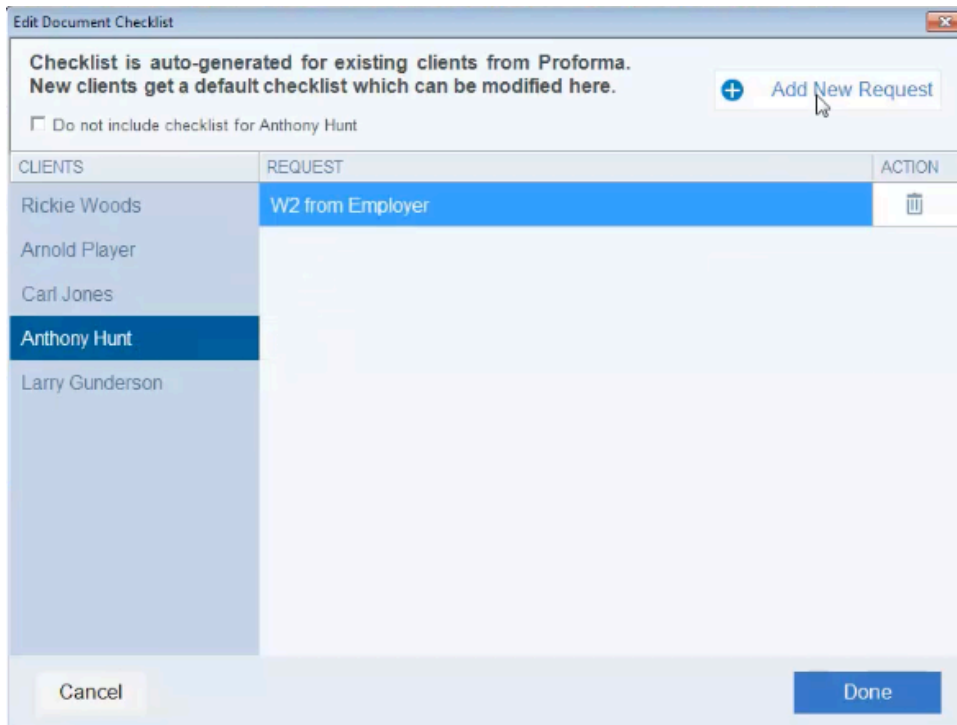
**Edit Document Checklist**

Checklist is auto-generated for existing clients from Proforma. New clients get a default checklist which can be modified here. [+ Add New Request](#)

Do not include checklist 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...	
<b>Carl Jones</b>	W2 from Taxpayer New York Employer	
Anthony Hunt	W2 from Taxpayer California Employer	
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.



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

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

