

Intuit Link Instructions for Clients

Accepting an Invite/Creating an Account

- You will receive an email invite from <u>link@intuit.com</u>. If you have not received the invite email, please check your spam folder. If you still do not see it, please contact our office.
- Press the "Accept" button in the invitation email.

Picket Fence Tax Service Inc. <iink@intuit.com> To: pftsinc2012@gmail.com</iink@intuit.com>
Picket Fence Tax Service Inc. Bicket Fence Tax admin@picketfencetax.com
Important Tax Information
Hello Client,
This year, we are using Intuit Link to get all the information we need to complete your tax return. Intuit Link is: - The easiest way to know what information we need from you, to see what you've already shared, and best of all, to know when you're done. - The most secure way to share data. - The fastest way to give our firm access to your tax data by taking pictures of documents with your phone or uploading from your computer.
Please click the link below to get started. If you have any questions, please contact our office via email or phone, both can be found below.
We look forward to working with you this season, Picket Fence Tax Service Inc (443) 356-4520 admin@picketfencetax.com
Intuit. Link
Intuit respects your privacy. Privacy Statement. If your receive a suspicious email, please Report it. © 2024 Intuit Inc. All rights reserved. Trademarks.

• Create an Intuit account by completing the requested fields **OR** if you already have an Intuit account (must be the same email address that received this invite), select the blue "Sign In" button at the bottom of the screen. *Please Note:* When creating a new account, it will require you to provide a phone number to text you a security code.

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Let's get you	in
Email address	
pftsinc2012@gmail.com	\odot
Password	Show
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To protect your account, we'll sence verify it's you. Standard call or SMS	l a code to quickly i rates may apply.
Create an Intuit A	ccount
By selecting Create an Intuit Account, you and acknowledge our <u>Privacy Statement</u> .	agree to our <u>Terms</u>
Already have an account	? Sign in

• Follow any remaining steps provided until you get to the welcome screen, then press "Let's Get Started".



www.picketfencetax.com

(443) 356-4520

Picket Fence Tax

Intuit Link Instructions for Clients

Portal Access

After accepting the initial invite, you can access the portal at any time by visiting: <u>https://link.intuit.com/home/</u>

Our website also has a page with a link directly to the portal, and a copy of this instruction document to reference again in the future, if needed.

Uploading Documents

• Once logged into the portal, press the "Documents" button in the top menu.



• Press the blue + button to upload tax documents. Please upload documents in PDF format if possible!

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		From	you		
			Add mr	+ re documents	

• Press the "Browse" button to find your files, select the files you want to upload, and upload.

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Drag and drop your files here, or browse
Browse
box (optional) then press "Save

• Add a description of the file(s) in the box (optional) then press "Save".

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Description of File(s)				
Other				
File(s) to Upload				
Rental Worksheet.pdf				
				Sawa
				Save

- Repeat this process until you have uploaded all tax documents.
- All uploaded documents will now show under the "Documents" tab.
- To open, rename, or delete a document, click the three blue dots to the right of the document name.

≡ INŤUIŤ Link	To Do 🧹 Documents Profile	Tax Year 2024 ▼ Log out
	From you	
	Add more documents	

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Intuit Link Instructions for Clients

- Once you have verified all tax documents uploaded, click the "To Do" button at the top of the page.
- Then, click the "I'm Done" button, which will open an email, OR send an email to

<u>admin@picketfencetax.com</u> to let us know you have finished uploading your documents. **Please include** your name in the subject or the body of the email!

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		Add more documents		Review your To Dos		

• *Please Note:* We will NOT begin your tax return until we have received an "I'm Done" email.

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Send	Cc]
	Subject	l'm done

Receiving/Viewing Documents from Picket

- Any time a Picket Tax staff member uploads a document to your portal, you will receive an email.
- Click the "View Documents" button in the email and log in to your Intuit account.





Intuit Link Instructions for Clients

• Once logged in, select the "Documents" button.

	To Do 🖌 D	ocuments Profi	le
	Picket Fend	ce Tax Service Ind	с.
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Okay! I'	ve been alerted of your sta	atus and will look at w	/hat you have.
Add more documents			Review your To Dos

• Click the document uploaded to view it and please SAVE/DOWNLOAD a copy to your device if it is your tax return!

nk	To Do 🖌 Documents Profile	Tax Year 2024
	From Picket Fence Tax Service Ind	с.
Test, Client-2024 Tax Return.pdf uploaded 8 minutes ago		
	From you	
	Add more documents	et.pdf ss ago