

This reference guide will provide you with tips, shortcuts and other useful information on using ProFile.

Quick Reference Guide

Updates

Our Automatic Check for Updates feature (Options > Environment > System) ensures that you have the latest ProFile versions all through the year. If you turn this feature off, be sure to regularly select Online > Check for Updates for the latest news and updates.

To control the timing of updates on networks, clear the checkbox Enable automatic check for updates under Options > Environment > System. To update, select Online > Update Information > Update Summary and click the Network administrators link at the top of the page. From there, download our re-distributable install file.

ProFile License Codes

Make sure you always enter your latest ProFile License Code after installation, by selecting Help > License > Add new access code from the ProFile menu.

TIPS

- Keep in mind that you can right-click on any ProFile form for a menu of options specific to that form (or field).
- The Form Explorer lists every form and worksheet. Open any file and press <F4> to display the Form Explorer. There are four views to help you find forms.
- ProFile has some great time-saving functions in the Options menu. Be sure to review and select your carry forward options before you carry forward your files (Options > Module). For information on how to share options on a network, visit our support website (www.profile.intuit.ca > Support)
- A Premier license includes a database for file management. Choose the Client Explorer (Options > Database) for unlimited custom, filtered lists of your files.
- To carry forward your prior year files, select File > Carry Forward. From the drop down list, select the type of file to carry forward. Browse to the folder where your files are stored, and select a file. Premier customers can batch carry forward using the ProFile databases.

KEYBOARD SHORTCUTS

Function key only		Ctrl +	Shift +	Alt +
F1	Help	Field help (if available)	Form help	
F2	Override/restore calculation	Override format		
F3	Client Explorer			
F4	Form Explorer	Close current file	Form Explorer (Line No.)	Exit ProFile
F5	Switch to spouse (T1/TP1)	Switch to RSI view (T2)	Switch federal/QC forms	Switch family file (T1/TP1)
F6	Jump to first source form	Next open file	List of source forms	
F7	Form Explorer (Detail)		Form Explorer (Keyword)	Backtrack to prior form
F8	Attach memo	Attach calculator tape		Snapshot/variance
F9	Display next audit message	Show/Hide Auditor	Display prior audit message	Quick print audit messages
F10	Tax summary	Non-zero T1 summary	Two-year tax summary	Quick print tax summary
F11		EFILE return	Instant SEND	Quick print T183
F12	Print current form			

*ProFile also supports standard Microsoft Windows® shortcuts.

WHERE TO LEARN MORE

These are excellent sources of information—many are available 24/7.

QuickStart

Here you'll find central access to the many ProFile resources. If you do not see our QuickStart window when you start ProFile, Choose Help > QuickStart.

Release news

Release information details the latest software updates. You'll also find News Alerts that keep you in-the-know, and details of any known issues or corrections in ProFile. (In ProFile, choose Online > Update Information.)

User-to-user forums

Get expert help from other tax professionals in our Web forums. (www.profile.intuit.ca > Support > Community Forums)

<F1> Help

Press <F1> on any form or field to display related information in the help system. In ProFile dialog boxes, click the [?] symbol in the top right corner, then click any element for help on that item.

Self-Serve Support

Visit ProFile's support website for answers to frequently asked questions, hot topics and other useful information (www.profile.intuit.ca > Support). In ProFile, choose Help > Support > InfoBase.

Contact our support team

In ProFile, choose Help > Support > Technical Support or call 1-800-452-9970.

BACKUP OPTIONS

- A regular backup routine could prove to be your best business practice!
- Options > Environment > File > Keep backup will always keep a copy of your next-to-last file save (recoverable through Windows Explorer®).
- Options > Environment > File > Auto save files every X minutes will save your current file at regular intervals.
- With Premier, use the Archive/Copy feature in your database to create quick backups of all files, or a selection of files.

AND MORE...

- File properties <Ctrl+I>
- T1, T2 jacket or Info form <Ctrl+J>
- Carry forward a file <Ctrl+R>
- Pause/start timer <Ctrl+T>
- Next form <Ctrl+Tab>
- Previous form <Ctrl+Shift+Tab>
- Top of next form <Ctrl+Enter>
- Top of previous form <Ctrl+Shift+Enter>
- Ditto key ` (back apostrophe)
- Next form Form
- Explorer checklist <Ctrl+Alt+PgDn>
- Last form Form
- Explorer checklist <Ctrl+Alt+PgUp>
- Next page on form <Ctrl+PgDn>
- Previous page on form <Ctrl+PgUp>
- Next section on form <Alt+PgDn>
- Previous section on form <Alt+PgUp>
- Clear review mark on field <Ctrl+Alt+0>
- Preparer sign-off <Ctrl+Alt+1>
- Partner sign-off <Ctrl+Alt+2>
- Correction required mark <Ctrl+Alt+3>
- Question review mark <Ctrl+Alt+4>
- End review <Ctrl+E>
- Erase highlighter <Ctrl+H>
- Close current form <Esc>
- Open form in new window <Ctrl+Alt+F6>
- Quick print non-zero summary <Ctrl+Alt+F10>

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