

# ProFile Review Setup

There are 3 steps that you need to do to get started:

- 1 Enable sync in ProFile
- 2 Create an Admin/Company Account
- 3 Select and sync the returns that you wish to view in ProFile Review or ProFile Connect

Note: You will need your Order/Service Number and one License Key. You will find these on the ProFile receipt emailed to you by Intuit Canada.

## Step 1: Enable sync for ProFile Review and ProFile Connect

1. Open ProFile 2013. Click the new **Enable Sync** icon on the toolbar, shaped like a cloud.



2. The cloud icon changes to orange, indicating that you've enabled syncing. You're also asked if you want to create an Admin Account. Click **OK** to continue. (You may need your Office Manager or Software Administrator to set up the Admin/Company account first, and then invite you).



## Step 2:

Create an Admin/  
Company Account

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Note: You will need your Order/Service Number and a License Key to complete the next step.

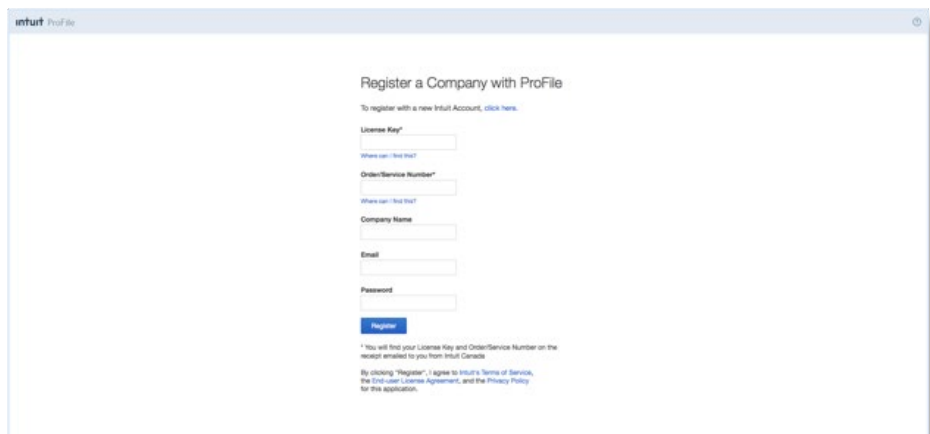
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1. When you turn on syncing, the **Manage Online Account** window appears. ProFile also opens a browser to the **Create a Company with ProFile Review** web page.
2. **If you already have an Intuit Online account:** In the **Create a Company with ProFile Review** page, enter your Service/Order Number and License Key, along with your existing account information (email address and password).

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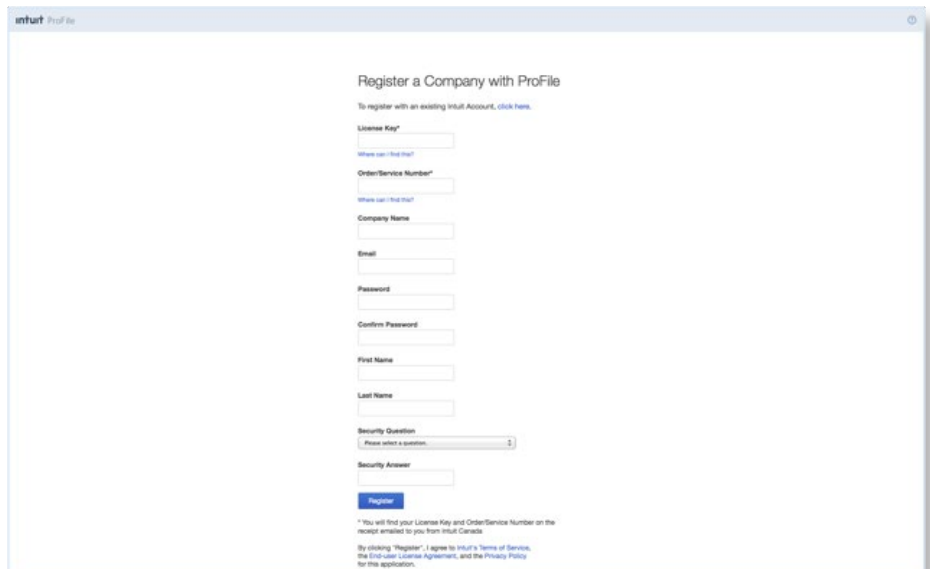
Note: If your security or virus software asks you to confirm that you are connecting to a valid Intuit domain, do so.

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The screenshot shows a web browser window titled "intuit ProFile". The page content is titled "Register a Company with ProFile" and includes a link: "To register with a new Intuit Account, [click here](#)." Below this, there are several input fields: "License Key\*", "Order/Service Number\*", "Company Name", "Email", and "Password". Each of the first three fields has a small blue link below it that says "Where can I find this?". At the bottom of the form is a blue "Register" button. Below the button, there is a small disclaimer: "\* You will find your License Key and Order/Service Number on the receipt emailed to you from Intuit Canada. By clicking 'Register', I agree to Intuit's Terms of Service, the End-User License Agreement, and the Privacy Policy for this application."

3. **If you do not have an Intuit Online Account:** Click the link to create a new account instead. You must choose a security question to help recover your password if you lose it. The email and password that you enter will be the login credentials that you use for ProFile Review, ProFile Connect, and the **Manage Online Account** window in ProFile desktop (which you'll use to configure the files that you sync online).



The screenshot shows a web browser window titled "intuit ProFile". The page content is titled "Register a Company with ProFile" and includes a link: "To register with an existing Intuit Account, [click here](#)." Below this, there are several input fields: "License Key\*", "Order/Service Number\*", "Company Name", "Email", "Password", "Confirm Password", "First Name", "Last Name", "Security Question" (with a dropdown menu and the text "Please select a question"), and "Security Answer". At the bottom of the form is a blue "Register" button. Below the button, there is a small disclaimer: "\* You will find your License Key and Order/Service Number on the receipt emailed to you from Intuit Canada. By clicking 'Register', I agree to Intuit's Terms of Service, the End-User License Agreement, and the Privacy Policy for this application."

## Step 2:

Create an Admin/  
Company Account

- Your Order/Service Number and License Key are on your ProFile receipt. The location of this information depends on whether you purchased ProFile through a telesales agent or online via our web site.

If you purchased ProFile from our web store, look for the **Order Number** and **License Key**:

Checkout

Thank you for your purchase  
Please [print this confirmation page](#) for your records. Your order confirmation will be sent to your email shortly. If you require technical support, please go to [support.intuit.ca/profile](#).

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<b>Customer Name:</b> november fifteen twenty thirteen	<b>Transaction Time:</b> 12:22 PM MST
<b>Order Number:</b> E448317367	<b>Merchant ID:</b> 91350017
<b>Order Date:</b> 15-11-13 (dd-mm-yy)	<b>Transaction ID:</b> 093940

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<b>Billing Address</b>	<b>Payment Method</b>
november fifteen twenty thirteen 50 candycane lane gotham city, AB CA, t5t5t5	Credit Card: VISA Card Number: XXXXXXXXXXXXX0100 Expiration Date: 02/2014

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**ProFile License Information - PLEASE READ**

**RETURNING Customer;**

Step 1. Download the new ProFile product by going to Online > Check for Updates  
Step 2. Go to Help > License > Add New License  
Step 3. Follow dialog boxes to activate product(s)

If you require additional help, [read the Installation & Product Activation instructions](#).

**NEW Customer;**

Step 1. Go to [Download ProFile](#) webpage  
Step 2. Follow the instructions under "Instructions for NEW Customers"  
Step 3. Once in the product, follow dialog boxes to activate product(s)

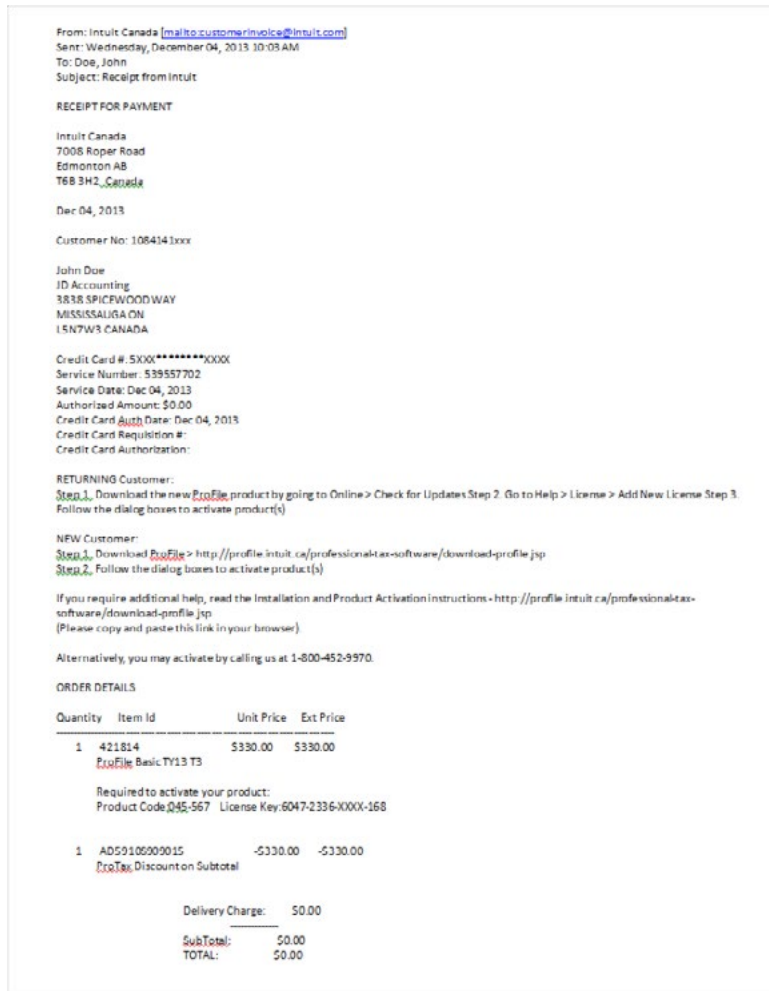
Alternatively, you may activate by calling us at 1-800-452-9970.

Item	Qty	Item Price	Item Total
ProFile Quebec Tax Suite Premier	1	<del>\$3,580.00</del>	<del>\$3,580.00</del>
Download		\$3,520.00	\$3,520.00
			You Save: \$60.00 (2%)
<b>Required to activate your product(s):</b>			
<b>Product Code:</b> 413-384			
<b>License Key:</b> 786014331438219			
<b>Sub-total:</b>			<b>\$3,520.00</b>
GST:			\$176.00
PST:			\$0.00
HST:			\$0.00
<b>Total (CAD):</b>			<b>\$3,696.00</b>
Total Savings:			\$60.00

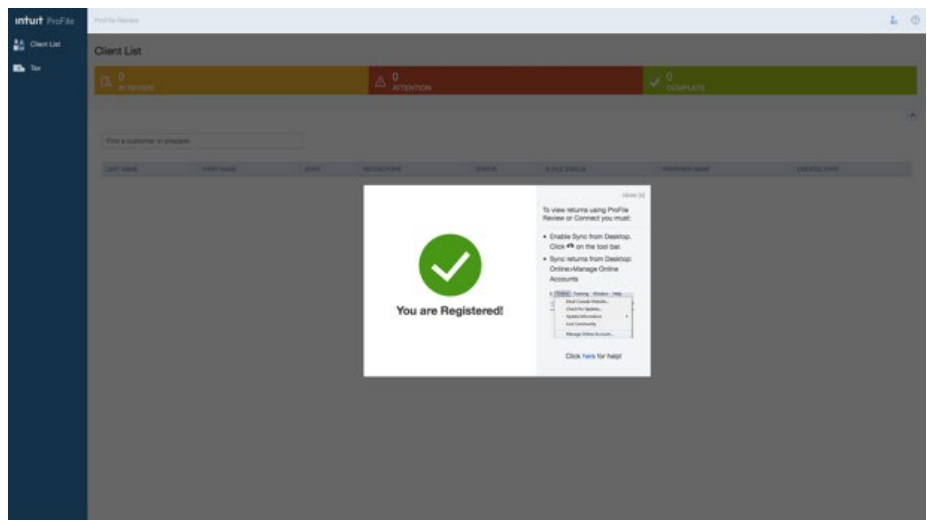
Returning your purchase

## Step 2: Create an Admin/ Company Account

If you purchased ProFile from a telesales agent, look for the **Service Number** and **License Key**:



5. You'll receive confirmation of your registration and are shown the remaining steps needed to complete ProFile Review setup.

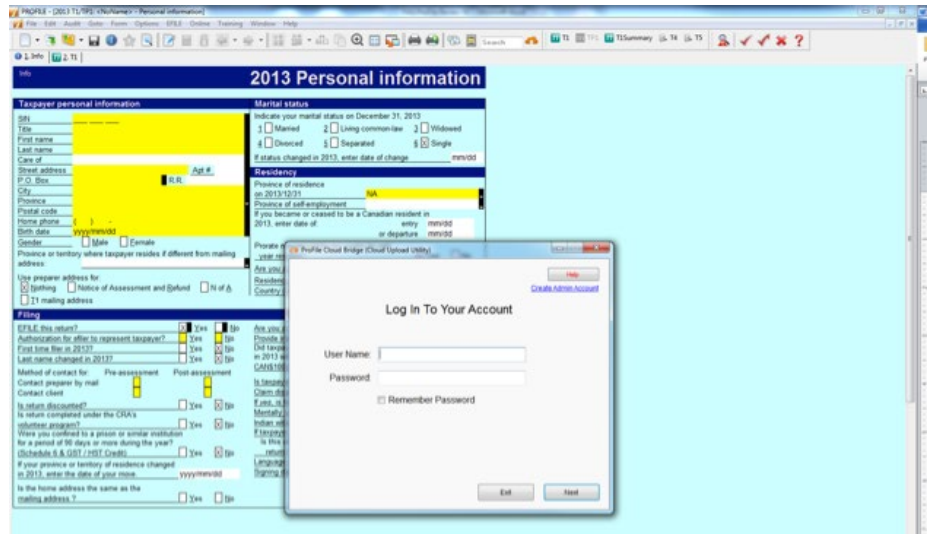


### Step 3:

Select and Synchronize your Files

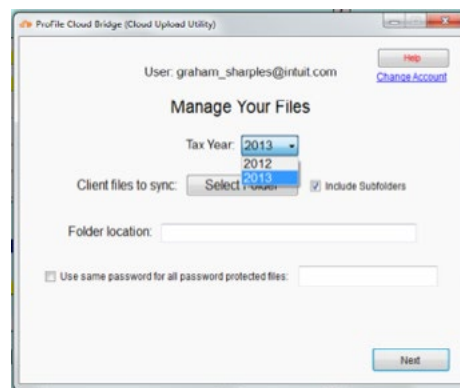
After you create your account and are taken to ProFile Review, you're reminded to select the files that you want to sync from ProFile desktop.

1. Return to ProFile desktop. If the **Log In To Your Account** window is not open, go to the **Online** menu and click **Manage Online Account**. (This window was automatically opened when you enabled syncing with the cloud button).



2. Enter the same **User Name** (email address) and **Password** that you just used to create your ProFile Review Admin/Company Account.
3. In the **Manage Your Files** window, select the tax year of the returns that you want to sync.

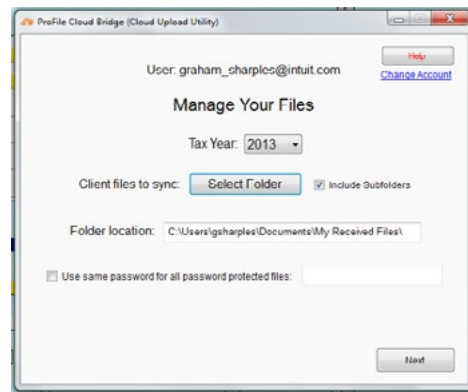
Note: ProFile Review supports only current-year returns. ProFile Connect supports both 2012 and 2013 year returns.



4. Click **Select Folder** and navigate to the file folder with the returns that you want to access from ProFile Connect or ProFile Review. ProFile will update the **Folder Location** field with the location that you select.

## Step 3:

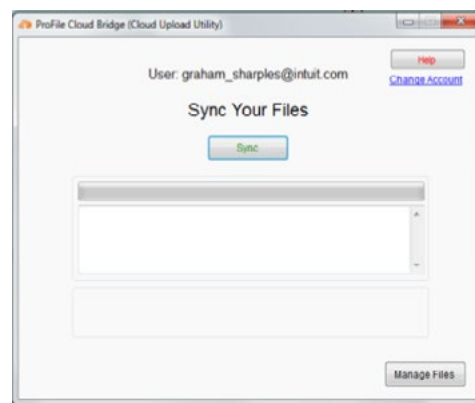
Select and Synchronize your Files



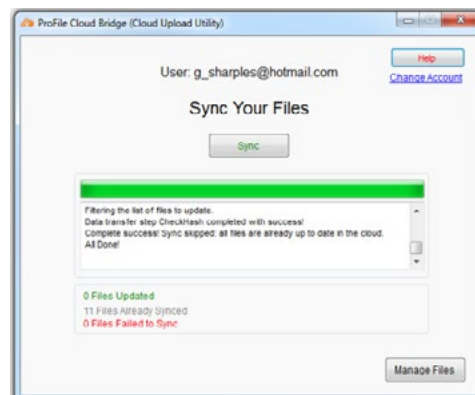
5. If your files are password-protected, enter the password in the password field below the Folder location and select the **Use same password for all password protected files** checkbox.

When you're done, click **Next**.

6. The **Sync Your Files** window appears. Click **Sync**.



7. Your files will now sync to the cloud. You'll receive feedback depending on whether your files successfully synced. Close the window (click **X** in the top right corner) if you are satisfied with the results.



8. You can now access your files with ProFile Connect or ProFile Review.