

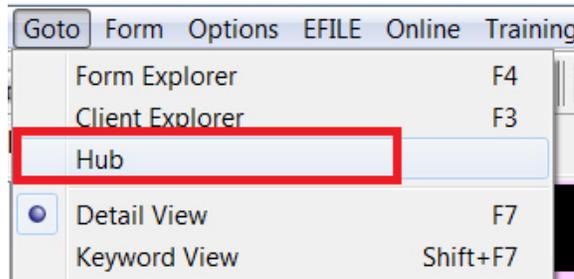
Inviting Clients to Hub

Hub allows preparers to invite clients to Hub via the client’s email; the client accepts the invitation and begins to submit the materials to Hub. After a client has accepted an invitation to Hub, you are able to manage their request responses in Intuit Link.

Note: it is not possible to invite multiple clients to Hub at once.

Inviting a Client to Hub

1. Open the ProFile application.
2. Select the “Hub” option from the “Goto” menu in the top toolbar:

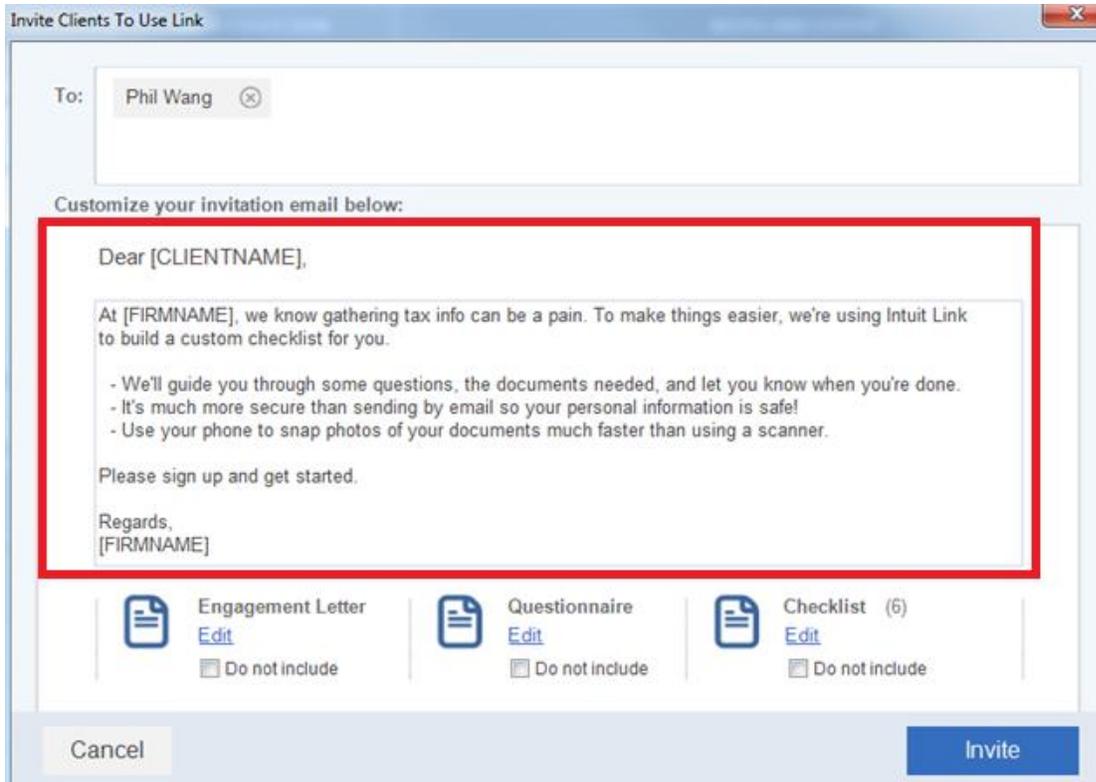


Hub opens, displaying a list of clients. Identify the client you wish to invite to Hub (e.g., “John, Alexis”).

3. Click the “Invite” button associated with the client.

ProFile Hub						
CLIENT INFORMATION		DATA COLLECTION		NOTES AND STATUS		
NAME	FILE NAME	INTUIT LINK	COMMENTS	STATUS	LAST SAVED	
Simpson, Jessica (647) 777-7776	JessicaSimpson V2123.15T	0/12	Payment is done.	Waiting For Client	Dec 16, 2016	
Simo, Jessica (647) 777-7776	JessicaSimpson V2123.15T	0/12	Payment is done.	Completed	Dec 14, 2016	
Gupta, Varun	T2205_1.15T	Invite	This is an awesome file completed through the ProFile Hub	Carried Forward	Jan 30, 2017	
Smith, John	T2205_10.15T	Invite Rejected	This is a sample character limite	In Partner Review	Dec 14, 2016	
Wang, Phil	T2205_159.15T	Invite	Add Note	Work In Progress	Dec 14, 2016	
John, Alexis (647) 949-6946	T2205_160.15T	Invite	Add Note	Work In Progress	Dec 16, 2016	

The “Invite Clients to Use Link” window opens. The “Customize your invitation email below” field contains existing invite text provided by Hub.

A screenshot of a software dialog box titled "Invite Clients To Use Link". The "To:" field contains "Phil Wang". Below it, a section titled "Customize your invitation email below:" contains a text area with a red border. The text in the area reads: "Dear [CLIENTNAME],
At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you.
- We'll guide you through some questions, the documents needed, and let you know when you're done.
- It's much more secure than sending by email so your personal information is safe!
- Use your phone to snap photos of your documents much faster than using a scanner.
Please sign up and get started.
Regards,
[FIRMNAME]". Below the text area are three document icons with labels: "Engagement Letter", "Questionnaire", and "Checklist (6)". Each has an "Edit" link and a "Do not include" checkbox. At the bottom are "Cancel" and "Invite" buttons.

4. Edit the invitation content to include your client's name, your firm, and any other applicable details.
5. Click the "Invite" button when the invite content is ready; the invitation is sent to the client.

The Hub client list displays the invited client's status as "Invite Pending". It will change to "Accepted" when the client accepts the invitation via their email.



After a client has accepted an invitation to Hub, you are able to manage their request responses in Intuit Link.