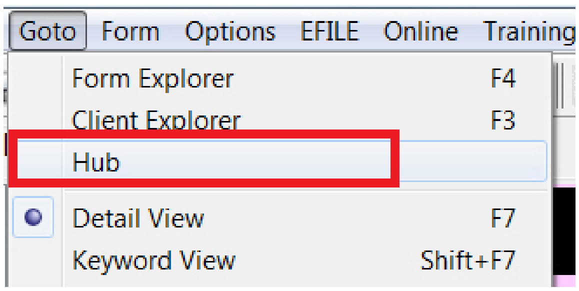
Inviting Clients to Hub

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.

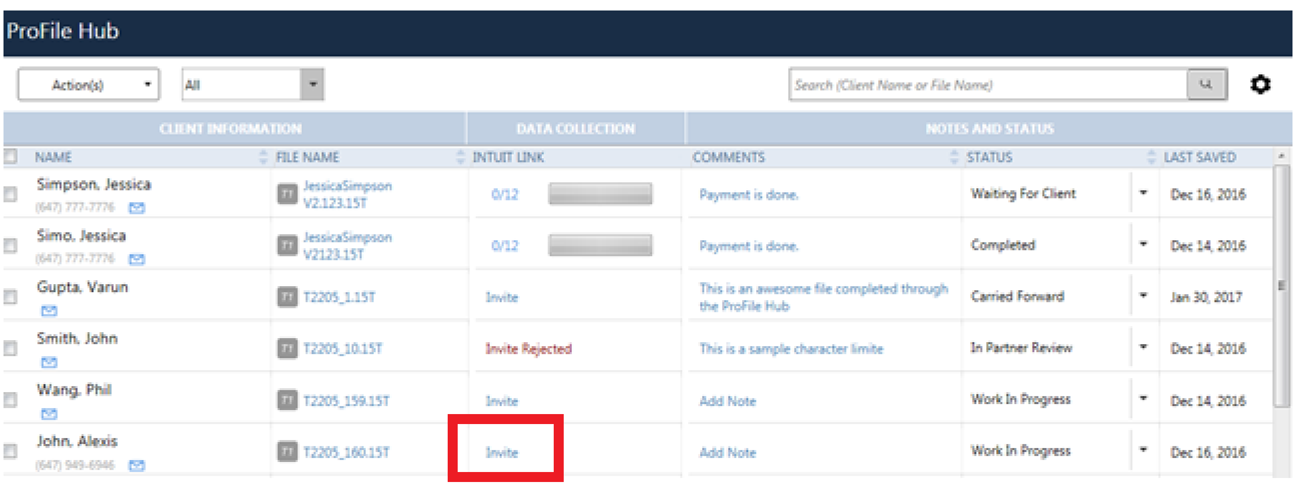
Inviting a Client to Hub

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

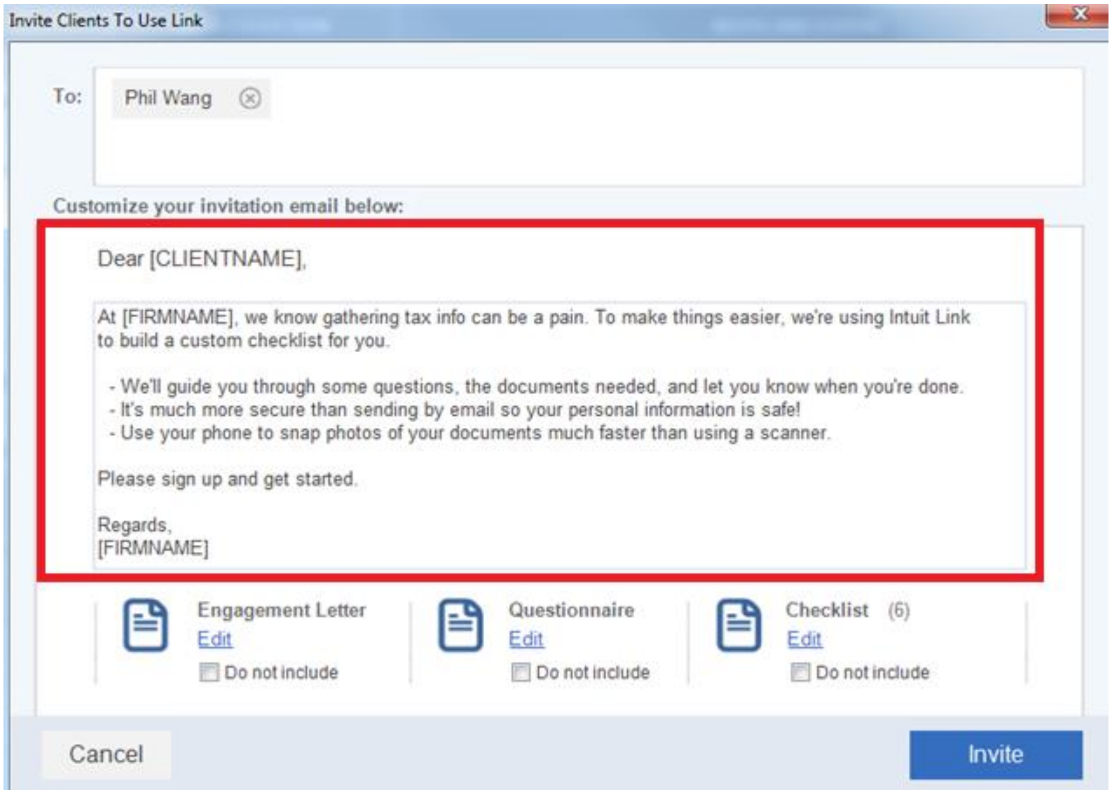


Hub opens, displaying a list of clients. Identify the client you wish to invite to Hub (e.g., "John, Alexis").

3. Click the "Invite" button associated with the client.

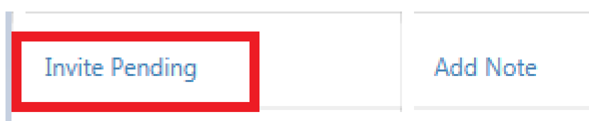


The "Invite Clients to Use Link" window opens. The "Customize your invitation email below" field contains existing invite text provided by Hub.



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.