

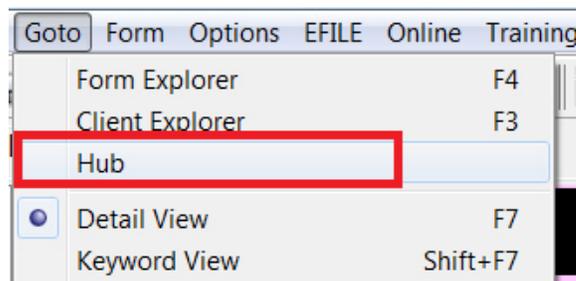
Personalizing an Engagement Letter in Hub

There are two options for personalizing an engagement letter in Hub:

- use an existing engagement letter (a “template”)
- create a new engagement letter

Using an Existing Engagement Letter

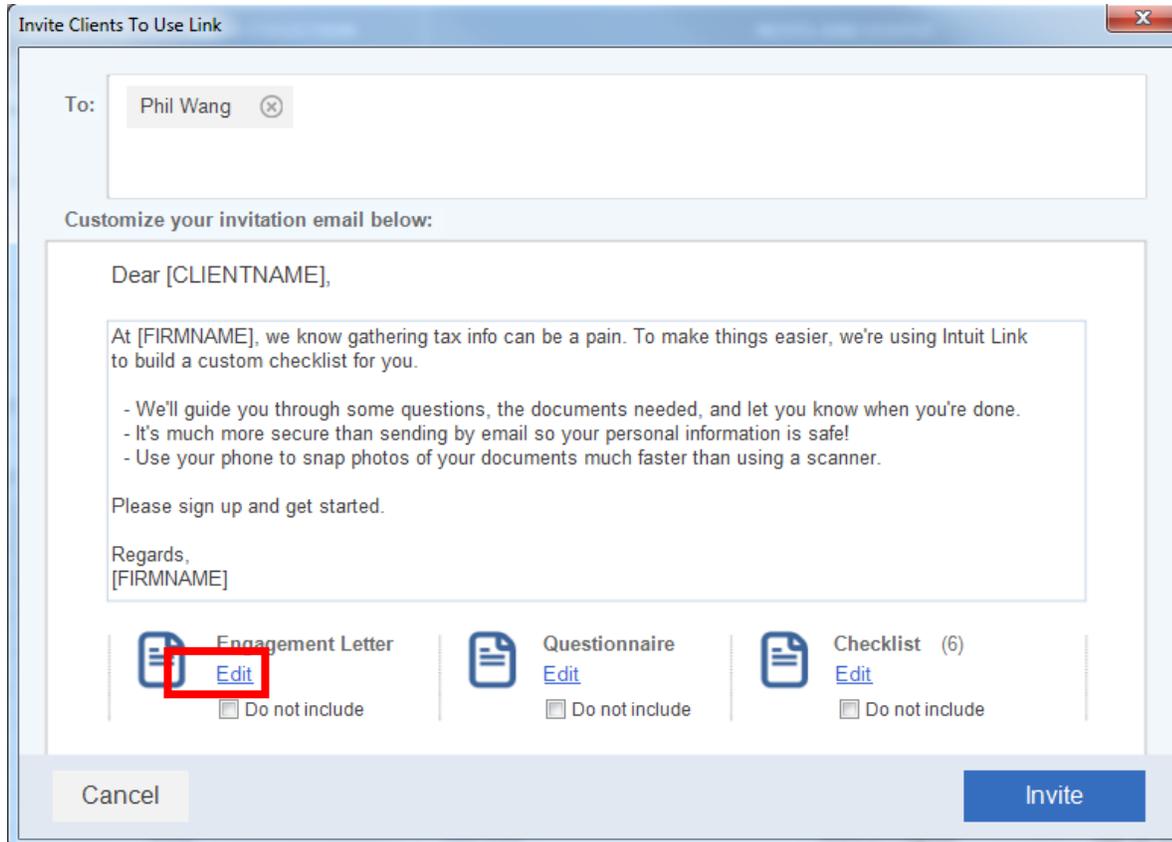
1. Open the ProFile application.
2. Select the “Hub” option from the “Goto” menu in the top toolbar.



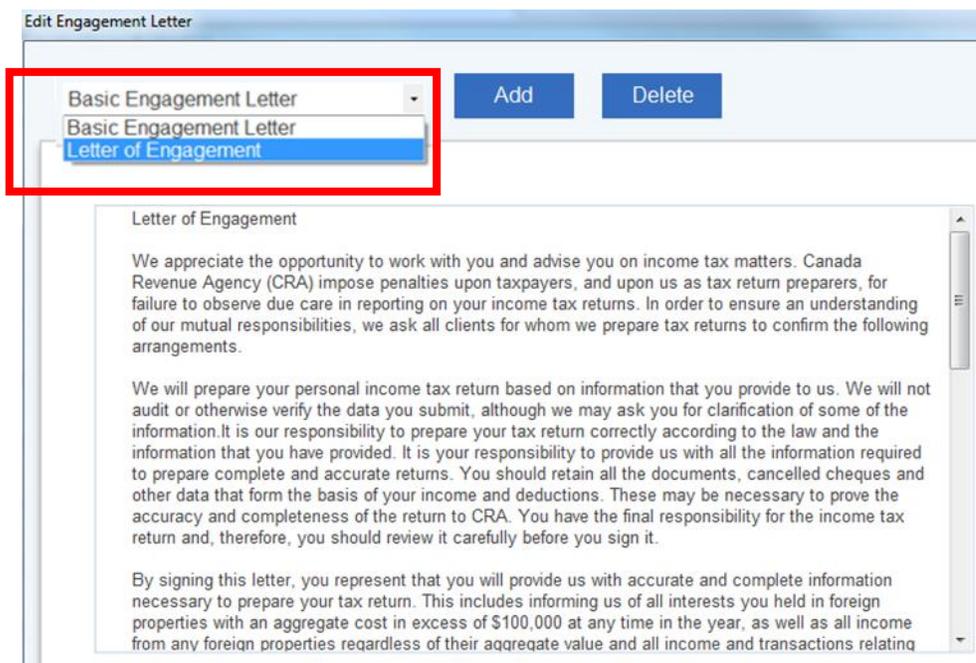
3. Hub opens, displaying a list of clients. Identify the client to whom you want to send an engagement letter (e.g., “John, Alexis”). Click the “Invite” button associated with the client.

CLIENT INFORMATION		DATA COLLECTION	NOTES AND STATUS		
NAME	FILE NAME	INTUIT LINK	COMMENTS	STATUS	LAST SAVED
Simpson, Jessica (647) 777-7776	JessicaSimpson V2.123.15T	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

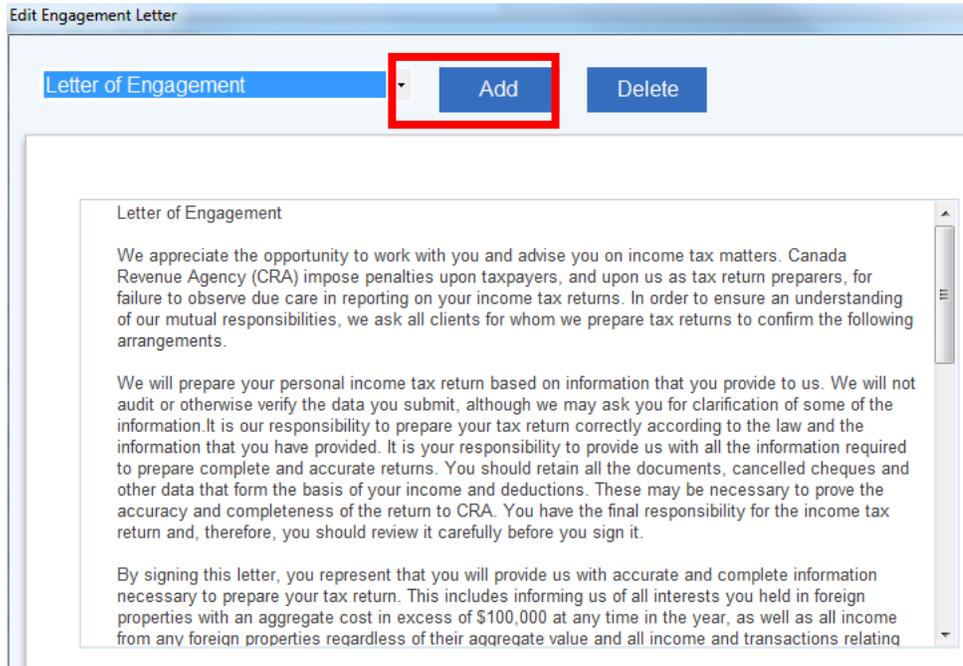
- The “Invite Clients to Use Link” window opens. Select the “Edit” link from the “Engagement Letter” option.



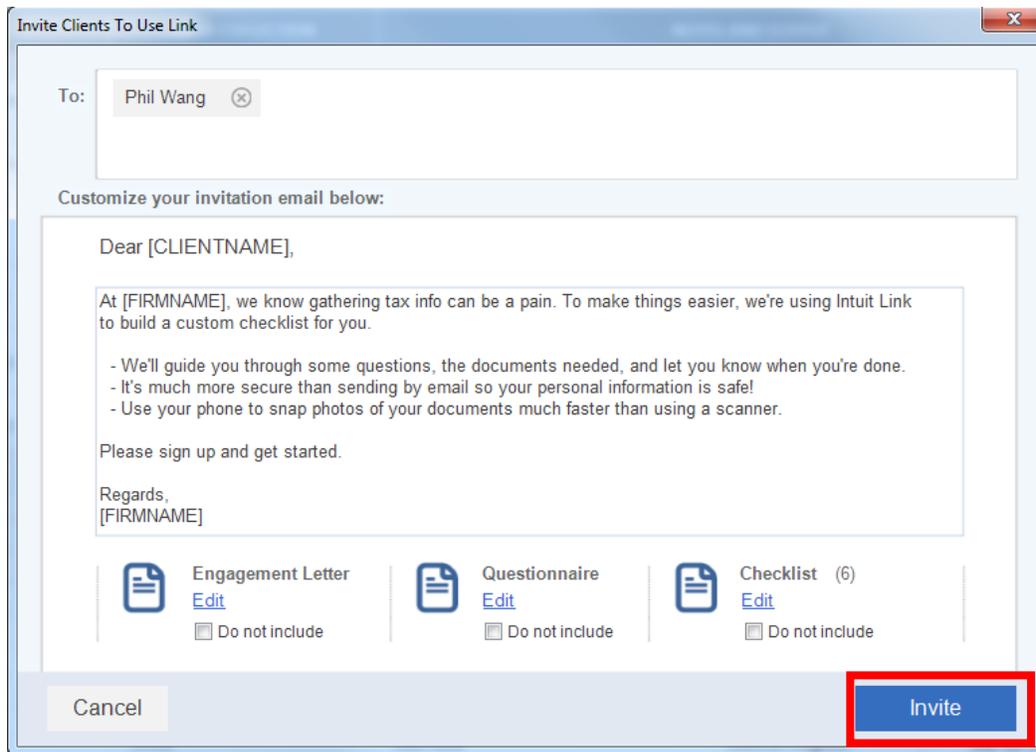
- The “Edit Engagement Letter” window opens. Click the drop-down menu at the top of the window; a list of existing templates already created displays:



6. Select the template engagement letter to send to the client. Additional edits may be made in the editing window. To save any new changes, select the “Add” button above the editing window.



7. Click the “Done” button; the letter saves.
8. Click the “Invite” button in the “Invite Clients to Use Link”; the engagement letter is sent to the client.



Adding a New Engagement Letter

1. Navigate to the client list in Hub. Identify the client to whom you want to send an engagement letter (e.g., “John, Alexis”). 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 V2.123.15T	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
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- The "Invite Clients to Use Link" window opens. Select the "Edit" link from the "Engagement Letter" option.

Invite Clients To Use Link

To: Phil Wang

Customize your invitation email below:

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.

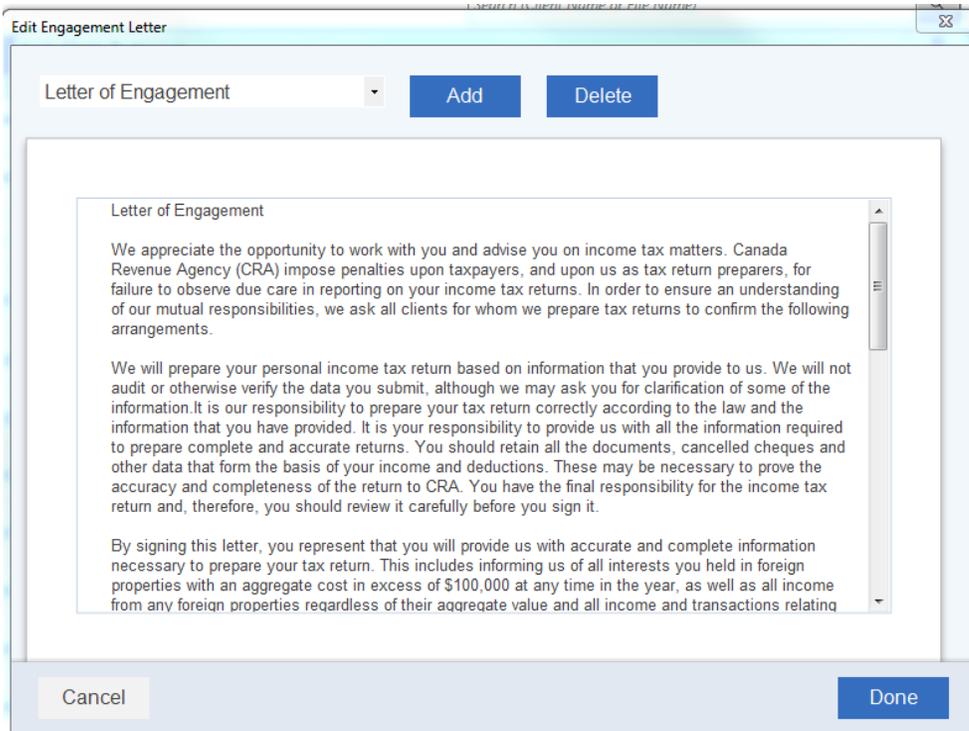
Please sign up and get started.

Regards,
[FIRMNAME]

Engagement Letter [Edit](#) Do not include
 Questionnaire [Edit](#) Do not include
 Checklist (6) [Edit](#) Do not include

Cancel Invite

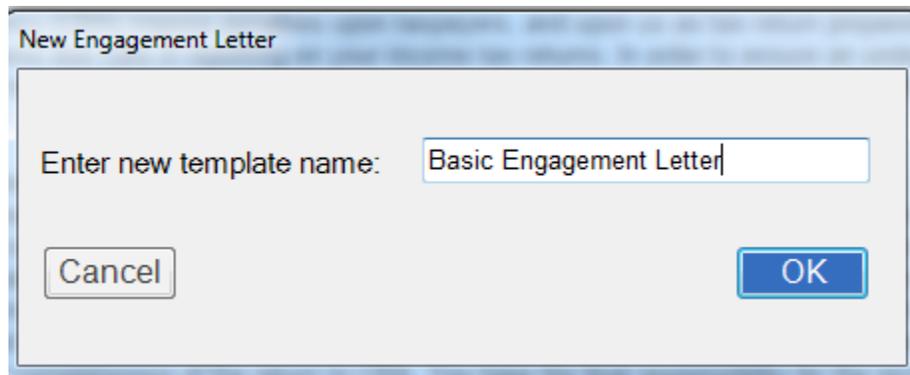
The "Edit Engagement Letter" editing window displays:



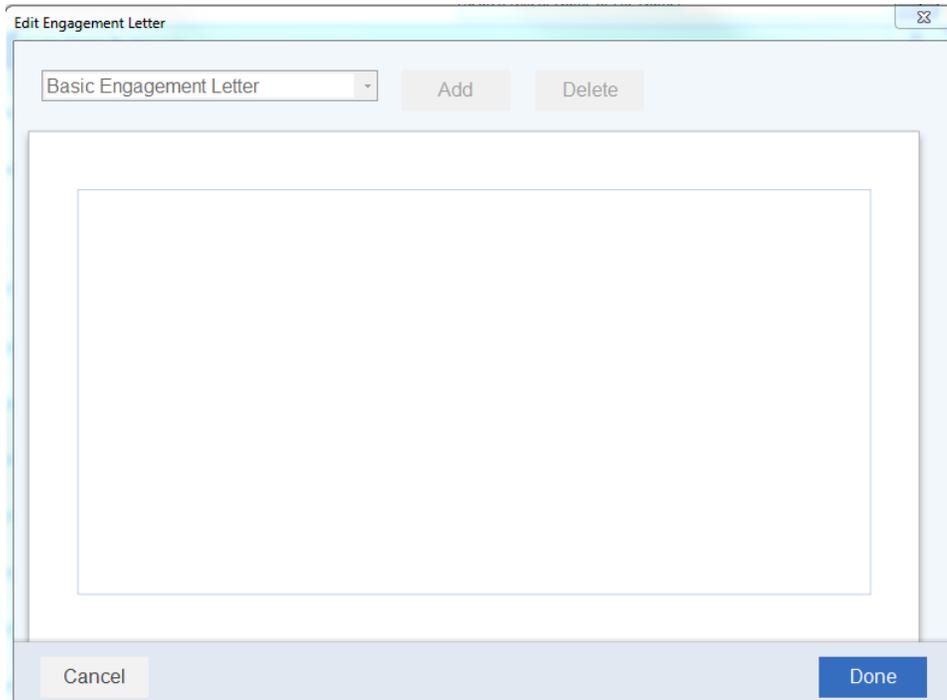
3. Edit the letter content as required.
4. Click the “ADD” button above the letter content to save the engagement letter for future use.



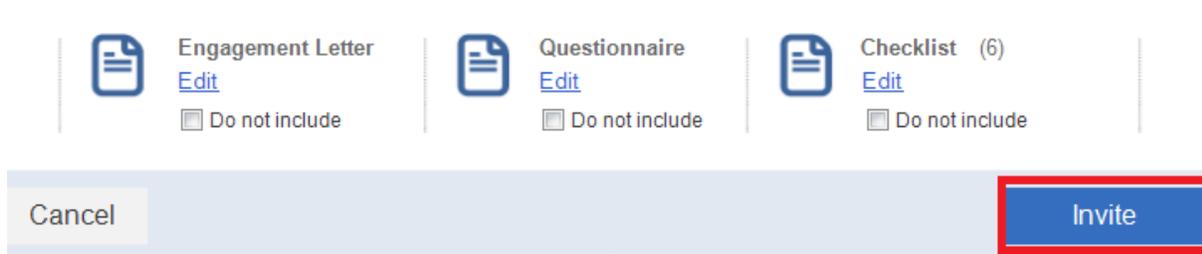
The user is prompted to save the new template:



5. Enter the name of the new template (e.g., “Basic Engagement Letter”).
6. Click the “OK” button; the new template is saved in the menu and the content may be entered.



7. Click the “Done” button; the template saves. It will be available under the drop-down menu when creating future engagement letters.
8. Click the “Invite” button in the “Invite Clients to Use Link”:



The engagement letter is sent to the client.