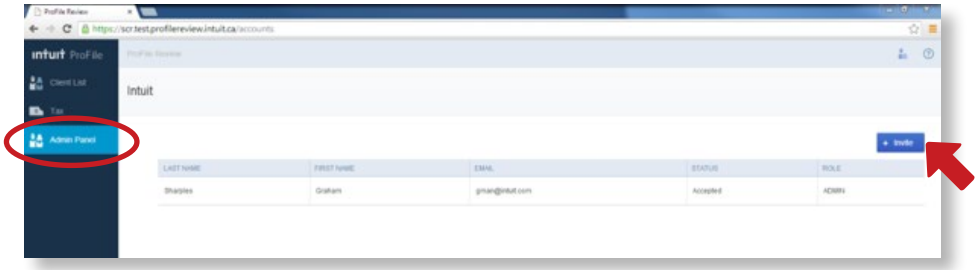
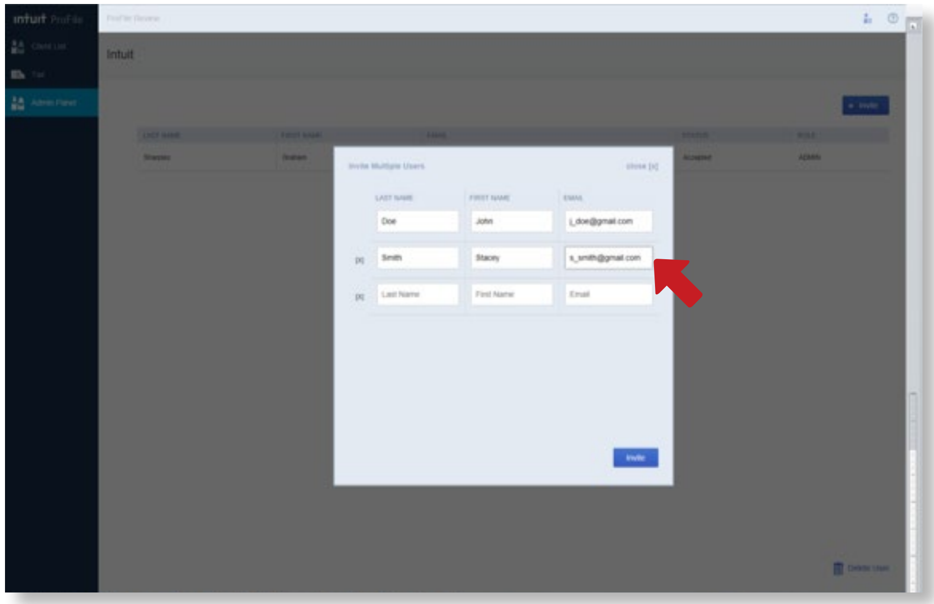
ProFile Review Features

Administrator:
Inviting Employees to your Company

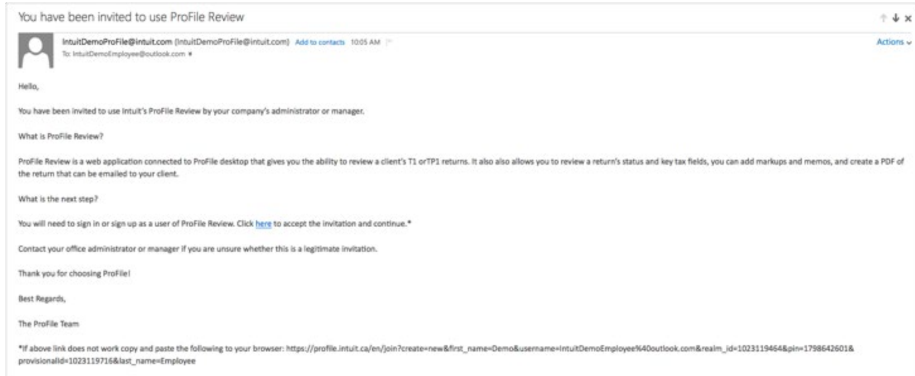
1. When you first open ProFile Review after creating your Admin/Company Account, you'll be brought to the **Admin Panel**. (If not, just click **Admin Panel** on the left). Click the **+ Invite** button to start inviting other employees to ProFile Review.



2. In the **Invite Multiple Users** window, add the names and email addresses of the users that you want to invite. When you're done, click **Invite.**



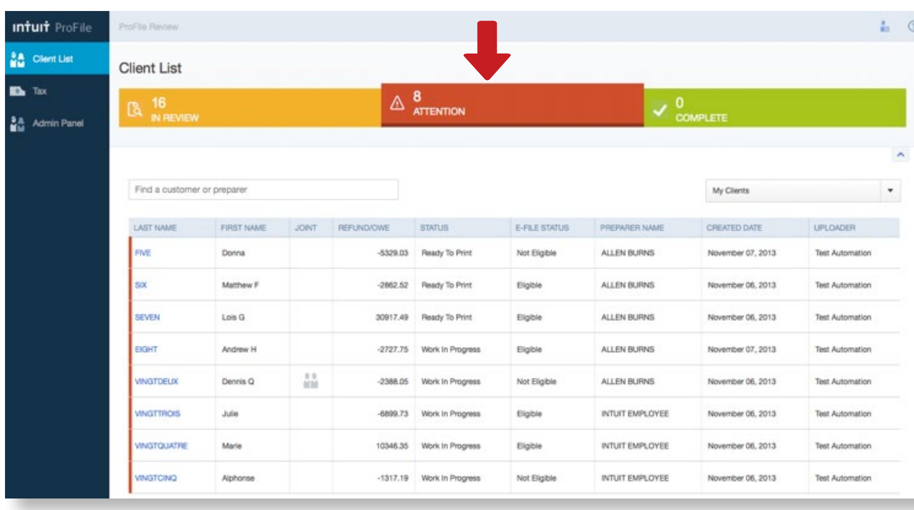
3. ProFile Review will send an email to each invitee. The email contains a link that allows the user to register with your ProFile Review account and create login credentials.



Note: Employees that you invite can also use ProFile Connect. Users can download ProFile Connect from their device's app store (iOS or Android).

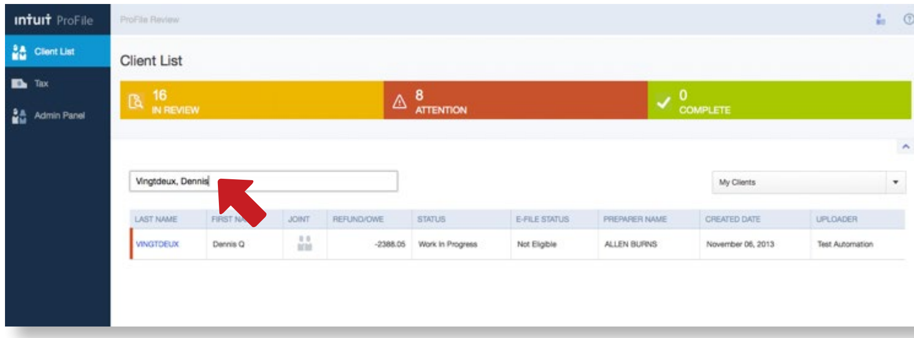
ProFile Review's
Client List

The **Client List** displays an overview of all returns attached to the current user or to the company. The coloured bars at the top of the screen summarize returns by their status (In Review, Attention, or Complete). Click a bar to filter the list by status.



Client/ Preparer
Search Bar

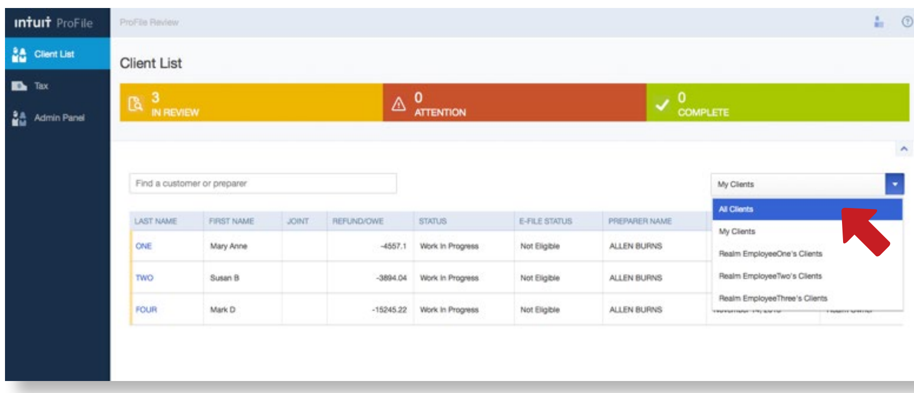
To search the Client List by the customer or preparer's name, enter the name in the **Search** box.



Client List
Preparer Filter

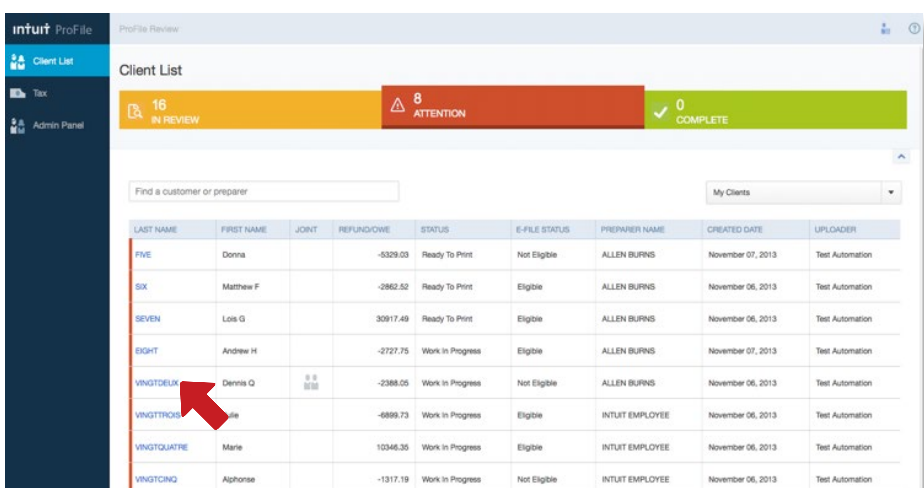
To sort and view returns that are prepared by a particular employee, select the preparer in the list box on the right.

Note: This option is available only to **Admin** users. **Employee** users can only see returns that they are preparing.



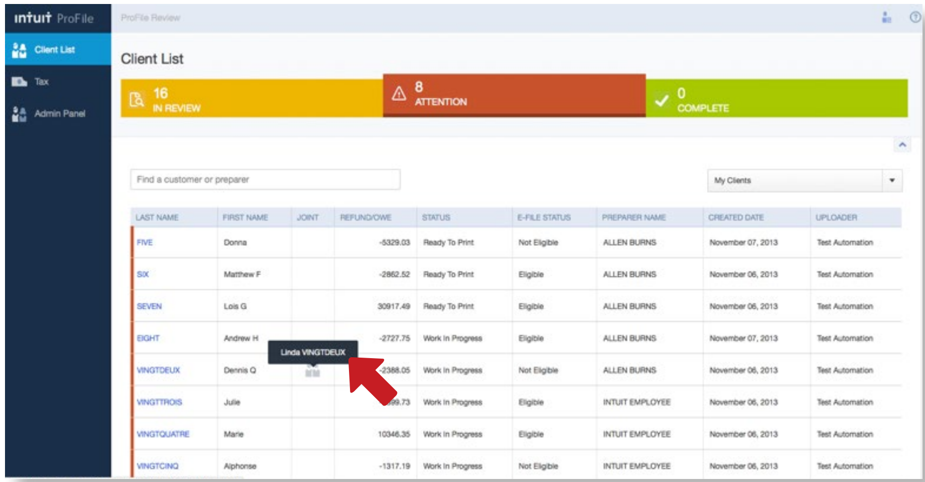
Opening
a Return

To open a return, click the **Last Name** of the customer.

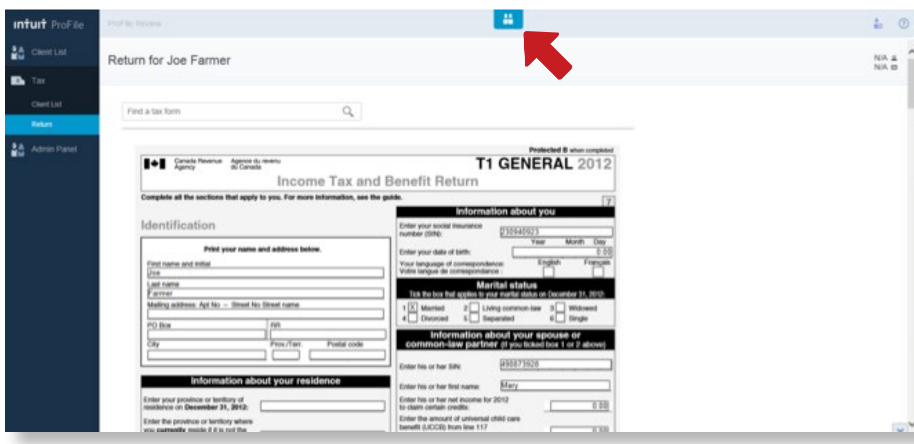


Opening a Spousal Return

Clients with an associated spousal return appear with a “spouse” icon in the Joint column. To open the spouse’s return, click the **spouse** icon. (Spouses’ returns do not appear as separate entries in the Client List).

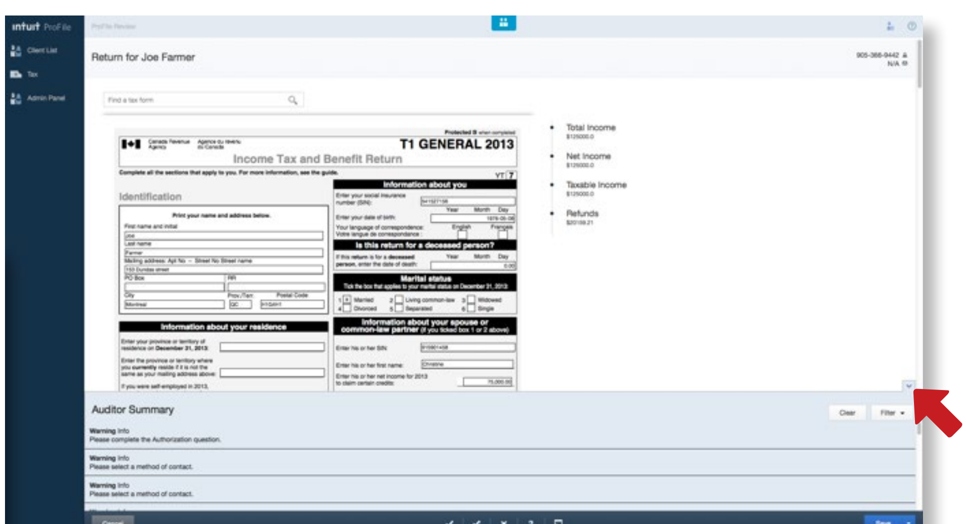


While viewing a pair of linked spousal returns, you can switch between spouses by clicking the **Spouse** tab at the top of the screen.



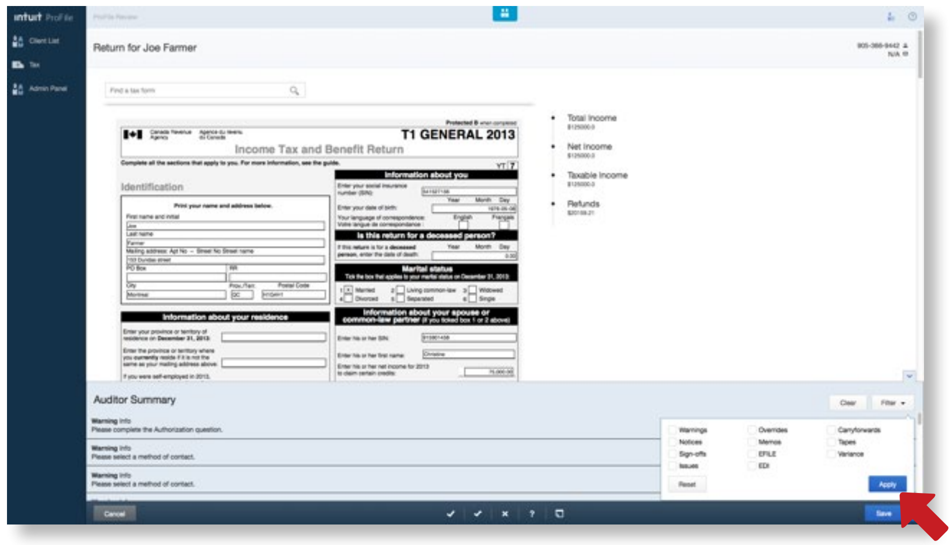
Title Case Messages

When you open a return, the Auditor Summary appears by default. To minimize, click the down arrow on the right corner of the Auditor Summary panel.



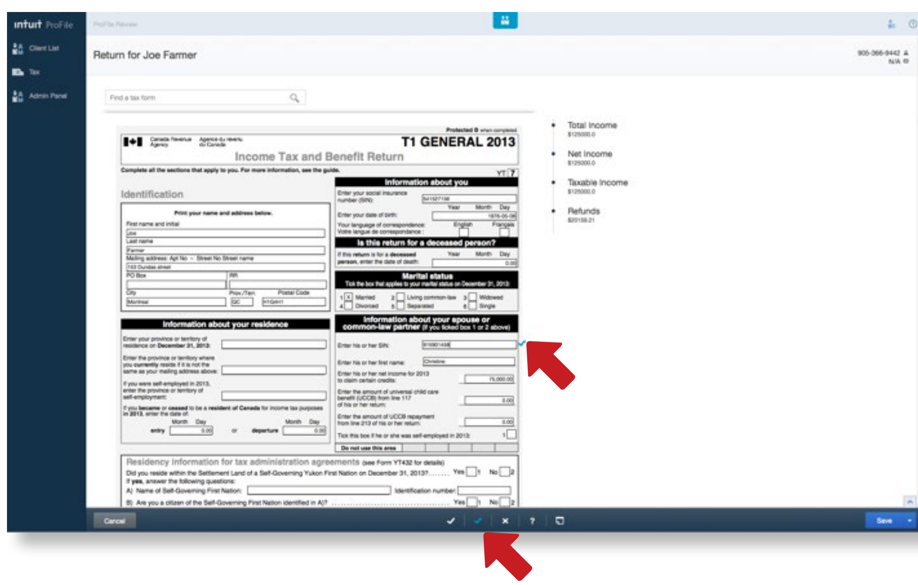
Auditor
Filter

To filter audit messages so that you see only messages of a certain type, click the **Filter** button. Select the checkboxes for the messages that you want to see and click **Apply**. Click **Clear** to clear all message filters.



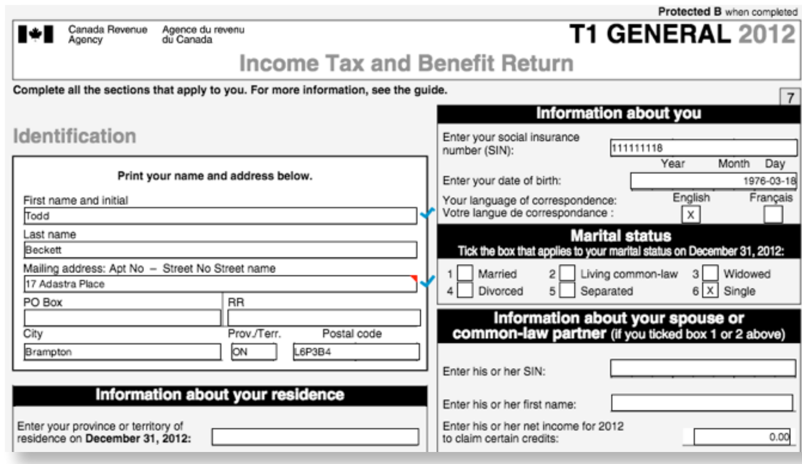
Adding/ Changing
Review Marks

To add a **Review Mark**, simply click the Title Case Review Mark at the bottom of the screen and then click the field on the form. To change a Review Mark, click the Title Case Review Mark at the bottom of the screen of the type that you want to change it to, and then click the field.

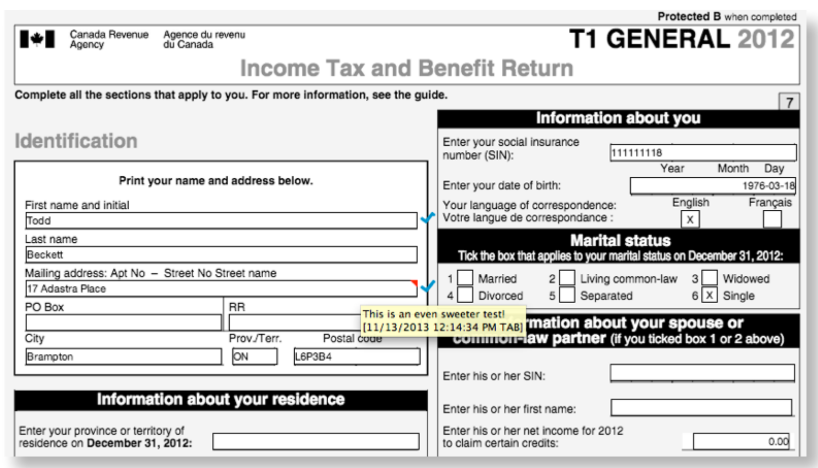


Viewing/ Editing
Memos

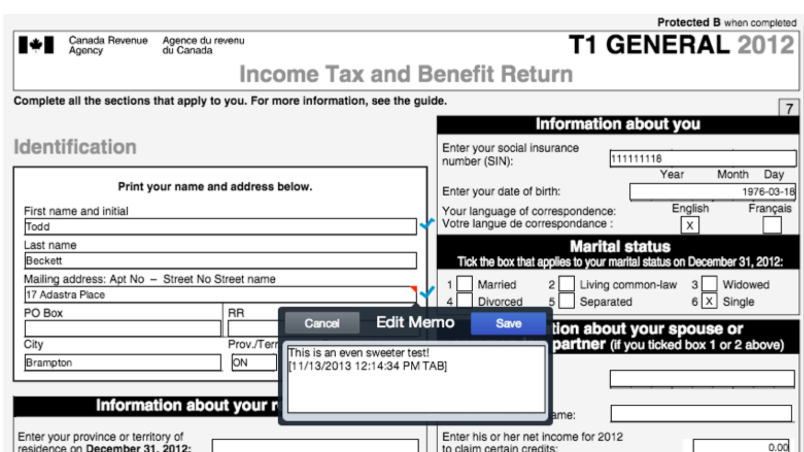
A red triangle in the corner of a field indicates that a **Memo** is attached to that field. Memos are notes that you or other preparers can add to fields in a return.



To view a Memo, mouse over a field that has a memo. (Currently, this works only when viewing the return on a desktop web browser.)

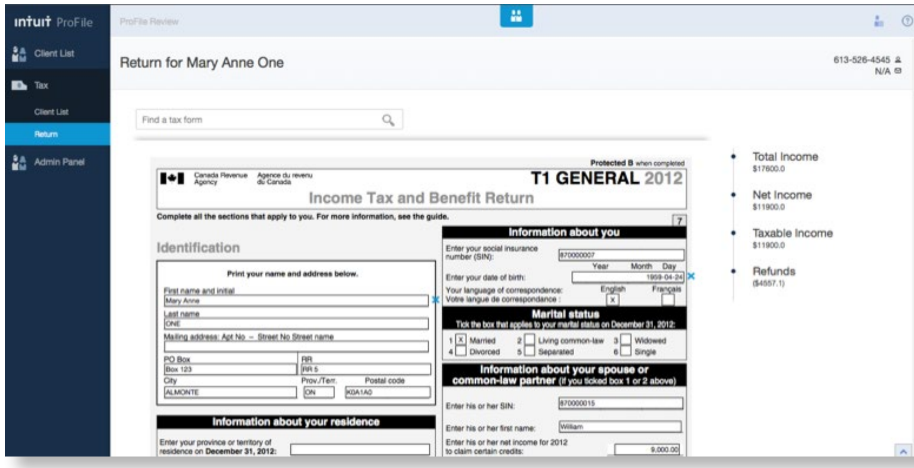


To edit a Memo, click or tap on the Memo icon at the bottom of the page. Then, click the field whose memo you want to add or edit and enter the memo text. When you're done, click **Save** to keep your changes to the memo or **Cancel** to discard them.

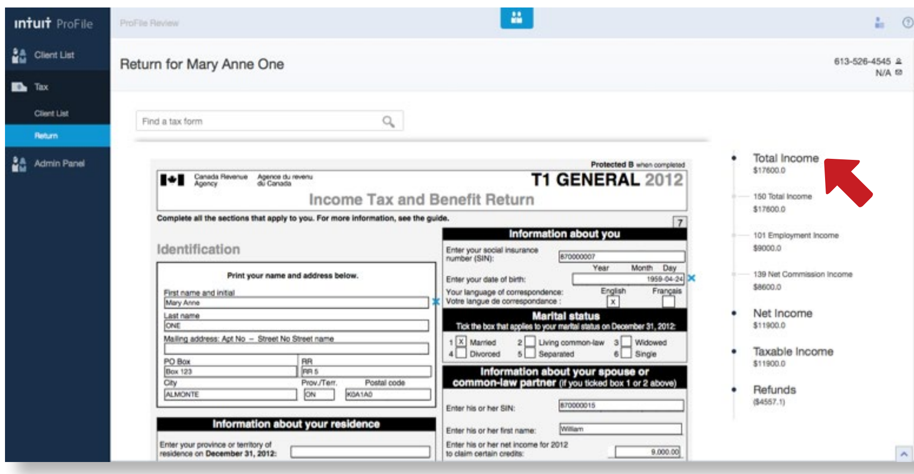


Key Information Tree

The **Key Information Tree** to the right of the return displays a summary of key fields and amounts and lets you quickly jump to those lines in the return.

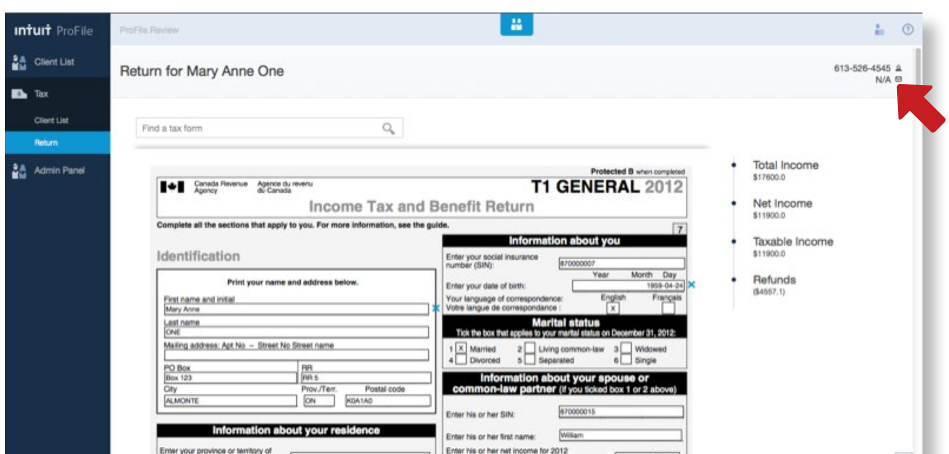


To expand the tree, click a line item. Double-click a line item to access that section of the return.



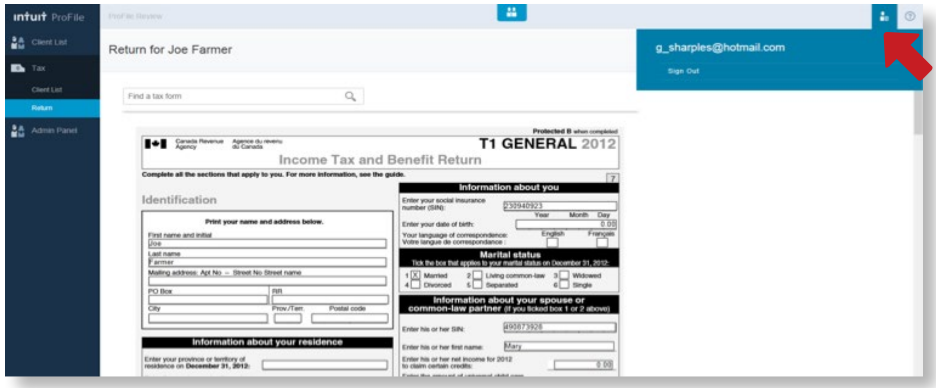
Client Contact Information

While viewing a return, basic contact information for the client appears in the top right corner of the screen.



Sign Out

To sign out, click the **Person** icon in the top right corner and choose **Sign Out**.



Help

To open the ProFile Review in-product help, click the **Help (?)** icon in the top right corner.