

ProFile Review

ProFile Review Features

Administrator:

your Company

 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.

You have been invited to use ProFile Review	÷Ψ×
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Helo,	
You have been invited to use intuit's ProFile Review by your company's administrator or manager.	
What is ProFile Review?	
ProFile Review is a web application connected to ProFile desitop that gives you the ability to review a client's TI orTPI returns. It also allows you to review a return's status and key tas fields, you can add markups and memor, and create a the return that can be emailed to your client.	PDF of
What is the next step?	
You will need to sign in or sign up at a user of ProFile Review. Click here to accept the invitation and continue.*	
Contact your office administrator or manager if you are unsure whether this is a legitimate invitation.	
Thank you for choosing ProFile1	
Best Regards,	
The ProFile Team	
*ff abow link does not work copy and paste the following to your browser: https://profile.intuit.ca/en/join?create-new&first_name-Demo&username-intuitDemoEmployee64ADoutlook.com&reaim_id=1023115464&pin=1398642801& provisionalid=1023115716&kas_name=Employee	

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

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.

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	six	Matthew F		-2862.52	Ready To Print	Eigible	ALLEN BURNS	November 06, 2013	Test Automation	
	SEVEN	Lois G		30917.49	Ready To Print	Elgible	ALLEN BURNS	November 06, 2013	Test Automation	
	EIGHT	Andrew H		-2727.75	Work In Progress	Elgible	ALLEN BURNS	November 07, 2013	Test Automation	
	VINGTOEUX	Dennis Q	-	-2388.05	Work In Progress	Not Eligible	ALLEN BURNS	November 06, 2013	Test Automation	
	VINGTTROIS	Julie		-6899.73	Work In Progress	Elgible	INTUIT EMPLOYEE	November 06, 2013	Test Automation	
	VINGTOLIATRE	Marie		10346.35	Work In Progress	Eigible	INTUIT EMPLOYEE	November 06, 2013	Test Automation	
	VINGTOINQ	Alphonse		-1317.19	Work In Progress	Not Eligible	INTUIT EMPLOYEE	November 06, 2013	Test Automation	

ProFile Review's Client List

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

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.

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	TWO	Susan B		-3894.04	Work in Progress	Not Eligible	ALLEN BURNS	Realm EmployeeTwo's Clients
	FOUR	Mark D		-15245.22	Work In Progress	Not Eligible	ALLEN BURNS	Realm EmployeeThree's Clients



To open a return, click the ${\color{black} \textbf{Last Name}}$ of the customer.

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	six	Matthew F		-2862.52	Ready To Print	Elgible	ALLEN BURNS	November 06, 2013	Test Automation	
	SEVEN	Lois G		30917.49	Ready To Print	Eligible	ALLEN BURNS	November 06, 2013	Test Automation	
	EIGHT	Andrew H		-2727.75	Work in Progress	Elgible	ALLEN BURNS	November 07, 2013	Test Automation	
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	VINGTQUATRE	Marie		10346.35	Work in Progress	Eligible	INTUIT EMPLOYEE	November 06, 2013	Test Automation	
	VINGTOINQ	Alphonse		-1317.19	Work In Progress	Not Eligible	INTUIT EMPLOYEE	November 06, 2013	Test Automation	

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).

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	sx	Matthew F		-2862.52	Ready To Print	Eligible	ALLEN BURNS	November 06, 2013	Test Automation	
	SEVEN	Lois G		30917.49	Ready To Print	Eligible	ALLEN BURNS	November 06, 2013	Test Automation	
	EIGHT	Andrew H	Linda VINGIT	-2727.75	Work In Progress	Eligible	ALLEN BURNS	November 07, 2013	Test Automation	
	VINGTDEUX	Dennis Q	111	-2368.05	Work in Progress	Not Eligible	ALLEN BURNS	November 06, 2013	Test Automation	
	VINGTTROIS	Julie		49.73	Work in Progress	Eligible	INTUIT EMPLOYEE	November 06, 2013	Test Automation	
	VINGTOUATRE	Marie		10346.35	Work in Progress	Eligible	INTUIT EMPLOYEE	November 06, 2013	Test Automation	
	VINGTOINO	Alphonse		-1317.19	Work In Progress	Not Eligible	INTUIT EMPLOYEE	November 06, 2013	Test Automation	

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

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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.

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Auditor Filter

Adding/

Changing

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.

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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.

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Re	turn for Joe Farmer	905-366-9442 N/A
Idmin Panel	Find a tax form Q	
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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.

	Protected B when completed
Canada Revenue Agence du revenu du Canada	T1 GENERAL 2012
Income Tax and B	enefit Return
Complete all the sections that apply to you. For more information, see the guid	de. 7
	Information about you
Identification	Enter your social insurance number (SIN): 111111118
Print your name and address below.	Enter your date of birth: Year Month Day 1976-03-18
First name and initial Todd	Your language of correspondence: English Français Votre langue de correspondance : X
Last name Beckett	Marital status Tick the box that applies to your marital status on December 31, 2012:
Mailing address: Apt No – Street No Street name 17 Adastra Place	1 Married 2 Living common-law 3 Widowed 4 Divorced 5 Separated 6 X Single
PO Box RR City Prov./Terr. Postal code	Information about your spouse or common-law partner (if you ticked box 1 or 2 above)
Brampton ON L6P3B4	Enter his or her SIN:
Information about your residence	Enter his or her first name:
Enter your province or territory of residence on December 31, 2012:	Enter his or her net income for 2012 to claim certain credits: 0.00

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.)

	Protected B when completed
Canada Revenue Agence du revenu du Canada	T1 GENERAL 2012
Income Tax and B	enefit Return
Complete all the sections that apply to you. For more information, see the guid	de. 7
	Information about you
Identification	Enter your social insurance number (SIN): 11111118
Print your name and address below.	Year Month Day Enter your date of birth: 1976-03-18
First name and initial Todd	Your language of correspondence: English Français Votre langue de correspondance : X
Last name Beckett	Marital status Tick the box that applies to your marital status on December 31, 2012:
Mailing address: Apt No – Street No Street name	1 Married 2 Living common-law 3 Widowed 4 Divorced 5 Separated 6 X Single
PO Box RR This is an ever [11/13/2013 City Prov./Terr. Postal code	aweeter test 12:14:34 PM TAB) COMMON-1aw partner (if you ticked box 1 or 2 above)
	Enter his or her SIN:
Information about your residence	Enter his or her first name:
Enter your province or territory of residence on December 31, 2012:	Enter his or her net income for 2012 to claim certain credits: 0.00

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.

	Protected B when completed
Canada Revenue Agence du revenu Agency du Canada	T1 GENERAL 2012
Income Tax and E	Benefit Return
Complete all the sections that apply to you. For more information, see the gu	uide.
	Information about you
Identification	Enter your social insurance IIIIIIIIII8
Print your name and address below.	Enter your date of birth: 1976-03-18
First name and initial Todd	Your language of correspondence: English Français Votre langue de correspondance : X
Last name Beckett	Marital status Tick the box that applies to your marital status on December 31, 2012:
Mailing address: Apt No – Street No Street name 17 Adastra Place	1 Married 2 Living common-law 3 Widowed 4 Divorced 5 Separated 6 X Single
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Information about your r	ame:
residence on December 31, 2012:	Enter his or her net income for 2012 to claim certain credits: 0.00

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.

intuit ProFile	ProFile Review	i O
Client List	Return for Mary Anne One Find a tax form Q	613-526-4545 & N/A @
រំ Admin Panel	The sectors have not next the sectors have and address below. The sectors have have address below. The sectors have address b	 Total Income s176003 Relincome s18000 Taxable Income s18000 Refunds g4657.1)

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

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Client List	Find a tax form	
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	ALMONTE DR POILAND Ender No or her Site. Endomotion Ender No or her Site. Ender No or her mail coorde for 2012 6.000.00)	• Retunds (\$4557.1)

Client Contact Information

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

Intuit ProFile	ProFile Review	L ①
Client List	Return for Mary Anne One	613-526-4545 & N/A @
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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.

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