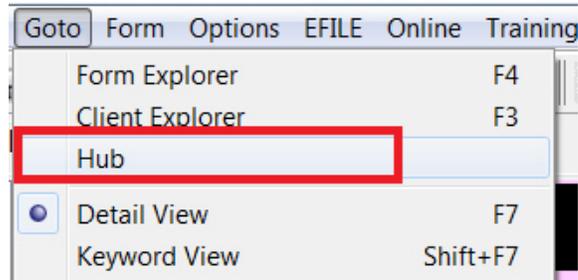


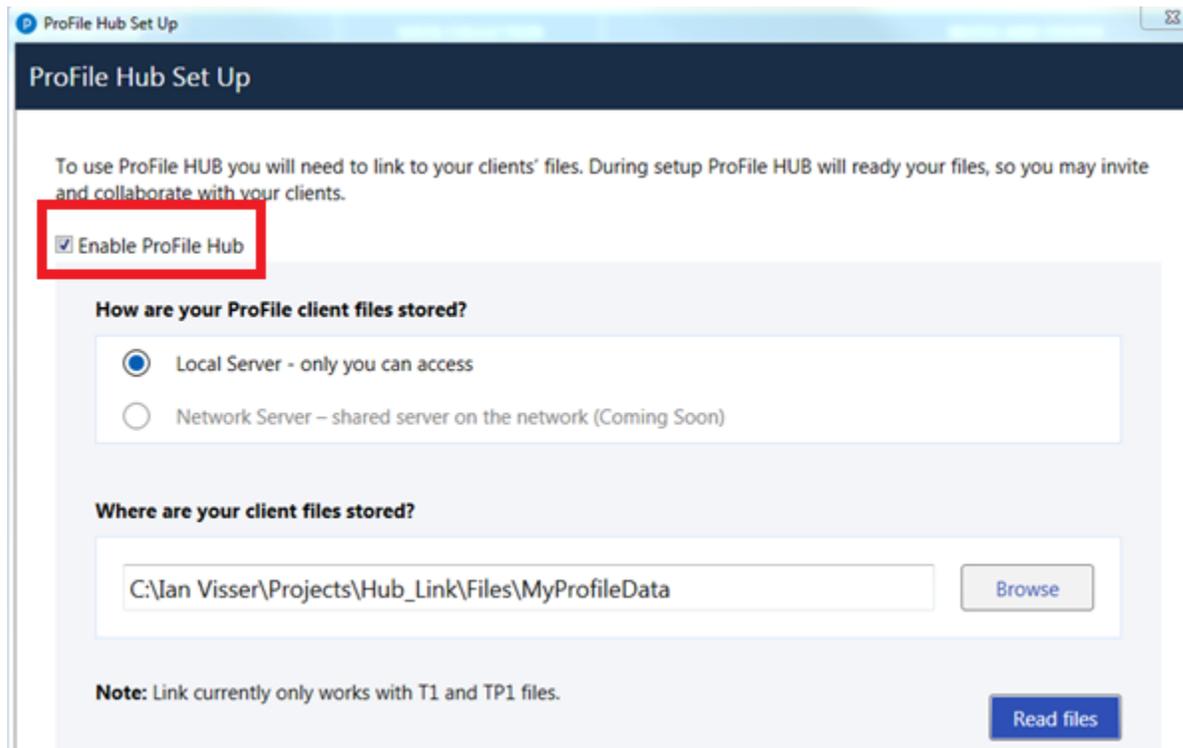
Getting Started with Hub

Download the latest version of ProFile.

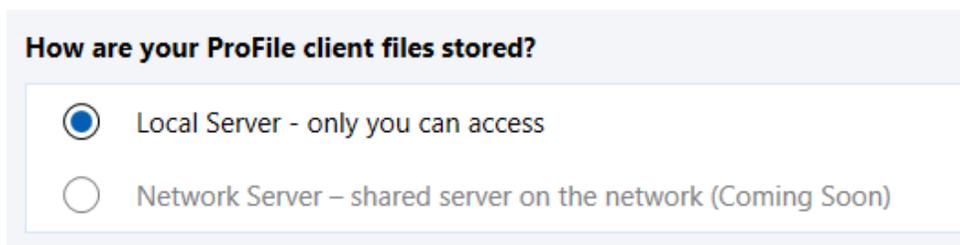
1. Open the ProFile application.
2. Select the “Hub” option from the “Goto” menu in the top toolbar:



3. Select the “Enable ProFile Hub” check box:



4. Select an option from the “How are your ProFile client files stored?” section:



5. Click the “Browse” button to navigate to a folder where client files are stored; this allows Hub to access client information:

Where are your client files stored?

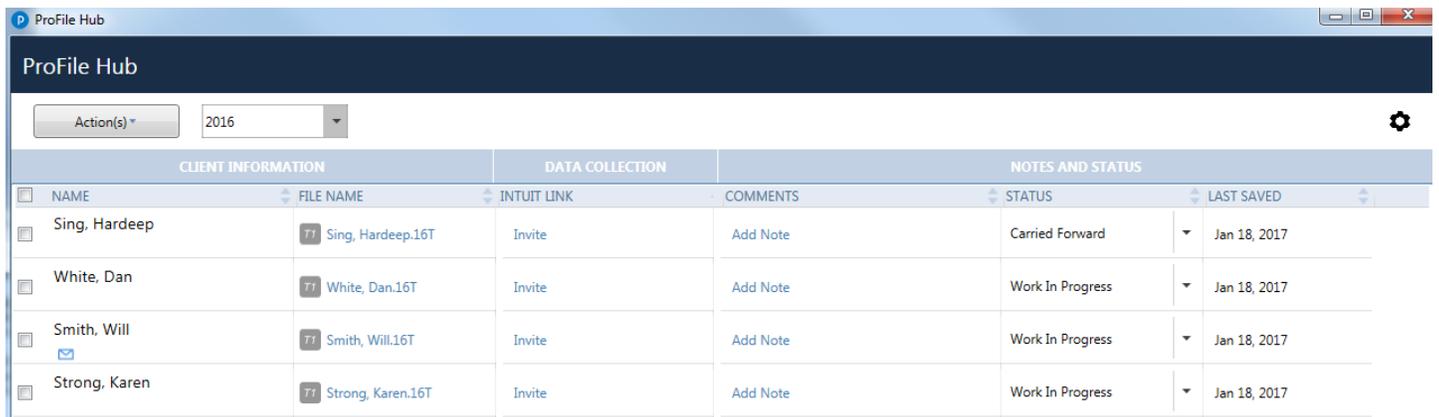
C:\Ian Visser\Projects\Hub_Link\Files\MyProfileData

Browse

6. Click the “Read files” button:

Read files

The Hub interface populates with clients; this information originates from the location selected in the set-up window:



CLIENT INFORMATION		DATA COLLECTION	NOTES AND STATUS		
NAME	FILE NAME	INTUIT LINK	COMMENTS	STATUS	LAST SAVED
<input type="checkbox"/> Sing, Hardeep	Sing, Hardeep.16T	Invite	Add Note	Carried Forward	Jan 18, 2017
<input type="checkbox"/> White, Dan	White, Dan.16T	Invite	Add Note	Work In Progress	Jan 18, 2017
<input type="checkbox"/> Smith, Will	Smith, Will.16T	Invite	Add Note	Work In Progress	Jan 18, 2017
<input type="checkbox"/> Strong, Karen	Strong, Karen.16T	Invite	Add Note	Work In Progress	Jan 18, 2017

7. Select which tax year to display clients for; the tax year selection drop-down menu is located above the client list, as illustrated in the following screenshot:



8. Select a tax year from the list; the list sorts to include only those clients from the selected tax year.