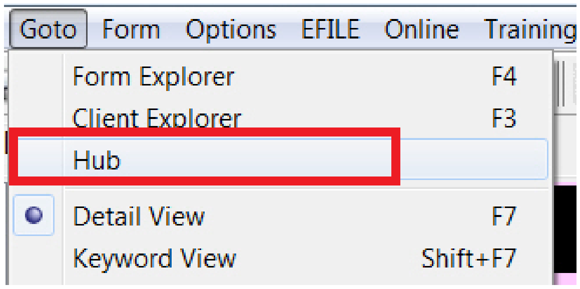
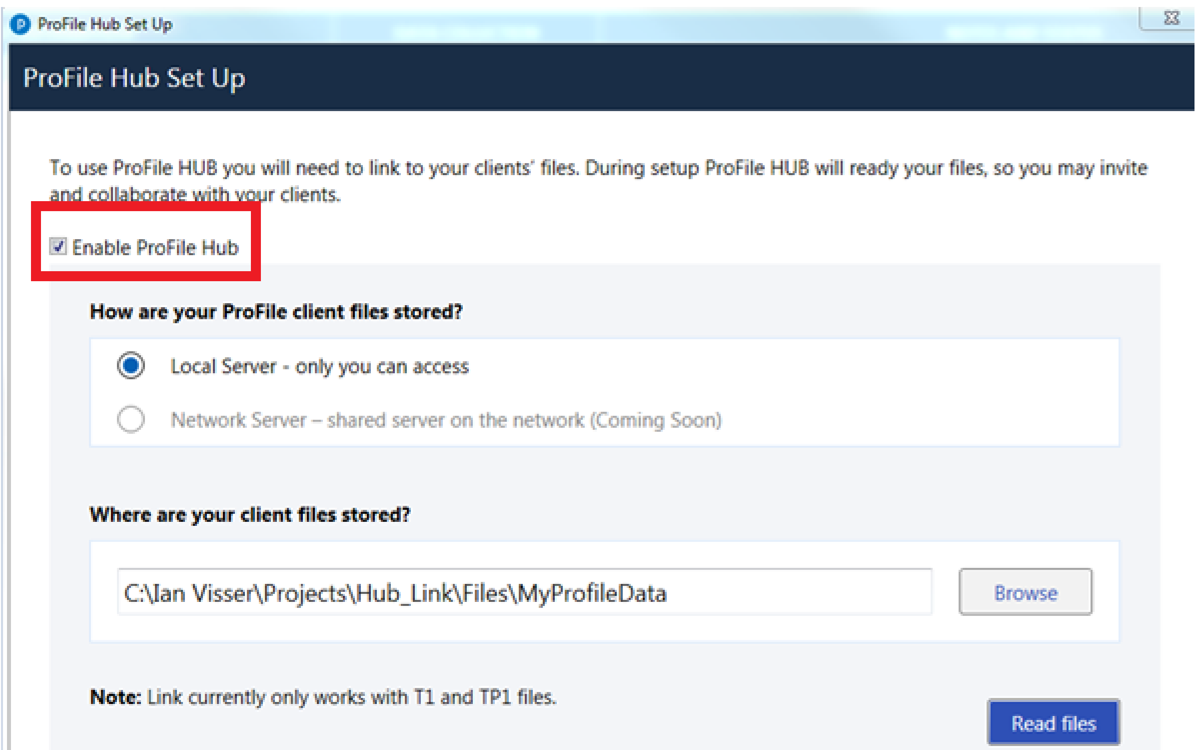
Getting Started with Hub

Download the latest version of ProFile.

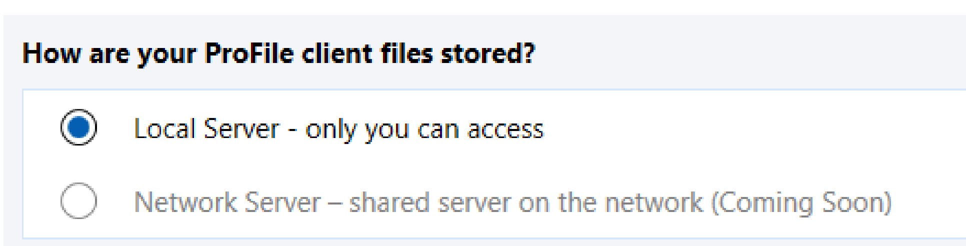
1. Open the ProFile application.
2. Select the "Hub" option from the "Goto" menu in the top toolbar:



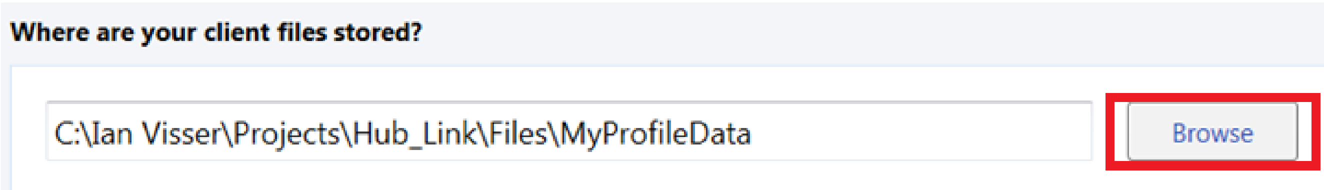
3. Select the "Enable ProFile Hub" check box:



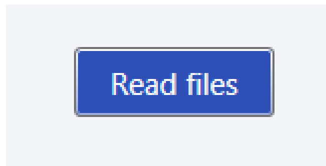
4. Select an option from the "How are your ProFile client files stored?" section:



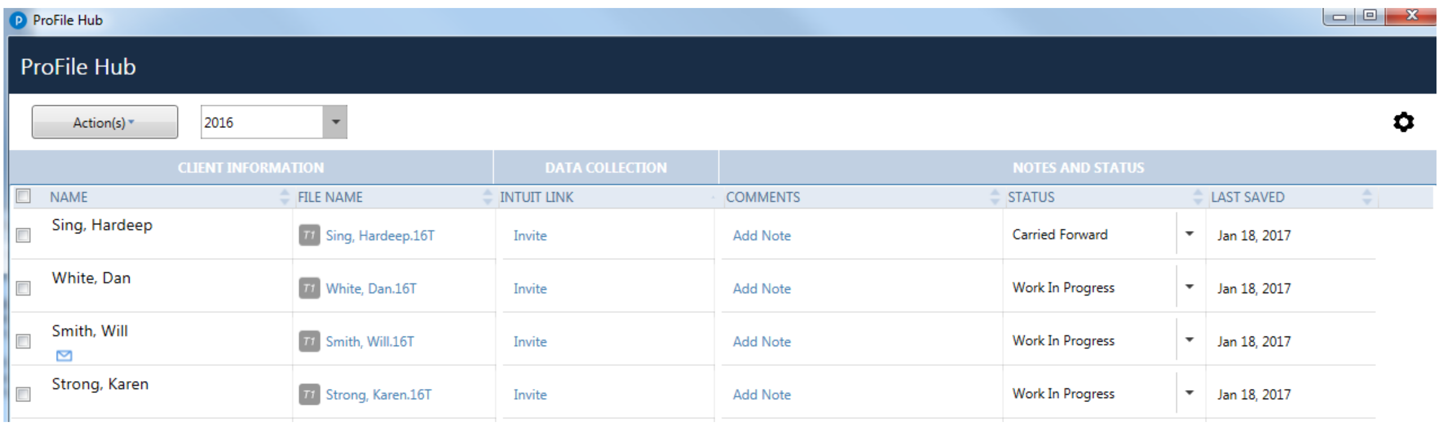
5. Click the "Browse" button to navigate to a folder where client files are stored; this allows Hub to access client information:



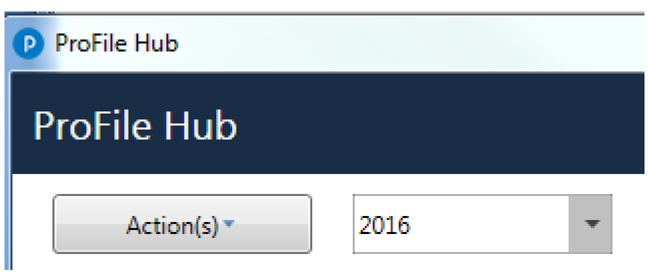
6. Click the “Read files” button:



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



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.