

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:

ProFile Hub Set Up
ProFile Hub Set Up
To use ProFile HUB you will need to link to your clients' files. During setup ProFile HUB will ready your files, so you may invite and collaborate with your clients. I Enable ProFile Hub
How are your ProFile client files stored?
Local Server - only you can access
Network Server – shared server on the network (Coming Soon)
Where are your client files stored?
C:\Ian Visser\Projects\Hub_Link\Files\MyProfileData
Note: Link currently only works with T1 and TP1 files. Read files

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?



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

P	ProFile Hub									×
ProFile Hub										
[Action(s) •	2016	•							٥
				DATA COLLECTION						
	NAME	÷	FILE NAME	INTUIT LINK	COMMENTS	🗘 STATUS	\$	LAST SAVED	\$	
	Sing, Hardeep		71 Sing, Hardeep.16T	Invite	Add Note	Carried Forward	•	Jan 18, 2017		
	White, Dan		71 White, Dan.16T	Invite	Add Note	Work In Progress	•	Jan 18, 2017		
	Smith, Will		77 Smith, Will.16T	Invite	Add Note	Work In Progress	-	Jan 18, 2017		
	Strong, Karen		71 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.