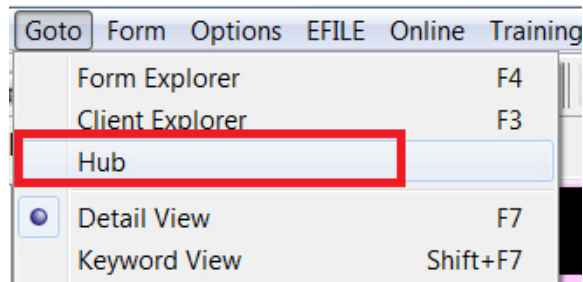


## Using Questionnaire Templates in Hub

The questionnaire template in Hub allows users to compile and send questions via email for clients to answer. Questionnaire templates can be customized for type of clients, location, or any other need. In addition, response types can include either “Yes/No” or “Open-ended” responses.

### Opening a Questionnaire Template

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



3. Hub opens, displaying a list of clients. Identify the client to whom you want to send an engagement letter (e.g., “John, Alexis”). Click the “Invite” button associated with the client.

ProFile Hub						
Action(s) ▾		All ▾	Search (Client Name or File Name) 🔍 ⚙️			
CLIENT INFORMATION		DATA COLLECTION		NOTES AND STATUS		
NAME	FILE NAME	INTUET LINK	COMMENTS	STATUS	LAST SAVED	
Simpson, Jessica (647) 777-7776	JessicaSimpson V2.123.15T	0/12 <input type="text"/>	Payment is done.	Waiting For Client	Dec 16, 2016	
Simo, Jessica (647) 777-7776	JessicaSimpson V2.123.15T	0/12 <input type="text"/>	Payment is done.	Completed	Dec 14, 2016	
Gupta, Varun	T2205_1.15T	Invite	This is an awesome file completed through the ProFile Hub	Carried Forward	Jan 30, 2017	
Smith, John	T2205_10.15T	Invite Rejected	This is a sample character limite	In Partner Review	Dec 14, 2016	
Wang, Phil	T2205_159.15T	Invite	Add Note	Work In Progress	Dec 14, 2016	
John, Alexis (647) 949-6946	T2205_160.15T	Invite	Add Note	Work In Progress	Dec 16, 2016	

4. The “Invite Clients to Use Link” window opens. Select the “Edit” link from the “Engagement Letter” option.

Invite Clients To Use Link

To: Alexis John

Customize your invitation email below:




Dear [CLIENTNAME],

At [FIRMNAME], we know gathering tax info can be a pain. To make things easier, we're using Intuit Link to build a custom checklist for you.

- We'll guide you through some questions, the documents needed, and let you know when you're done.
- It's much more secure than sending by email so your personal information is safe!
- Use your phone to snap photos of your documents much faster than using a scanner.

Please sign up and get started.

Regards,  
[FIRMNAME]






 Engagement Letter [Edit](#)  Do not include
  Questionnaire [Edit](#)  Do not include
  Checklist (6) [Edit](#)  Do not include

Cancel Invite

The “Edit Questionnaire” window displays:

Edit Questionnaire

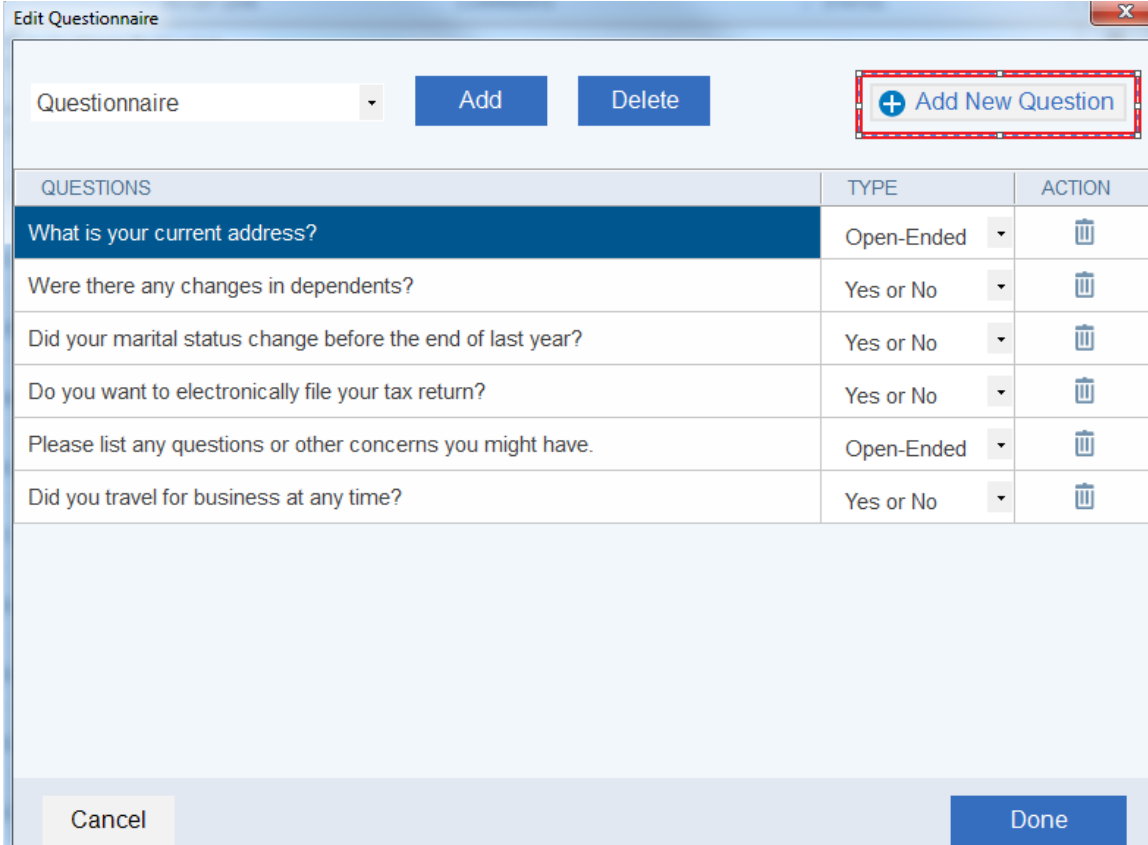
Questionnaire Add Delete [+ Add New Question](#)

QUESTIONS	TYPE	ACTION
What is your current address?	Open-Ended	
Were there any changes in dependents?	Yes or No	
Did your marital status change before the end of last year?	Yes or No	
Do you want to electronically file your tax return?	Yes or No	
Please list any questions or other concerns you might have.	Open-Ended	

Cancel Done

## Creating a New Question

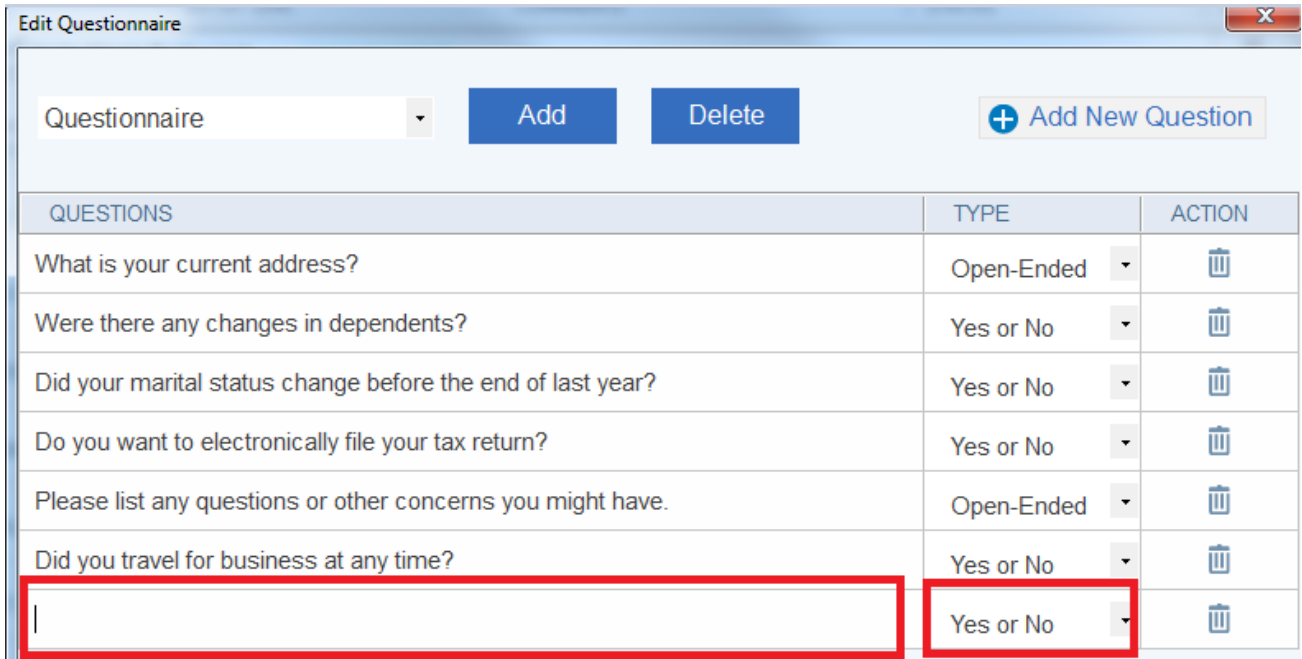
1. Click the “Add New Question” button.



Questionnaire

QUESTIONS	TYPE	ACTION
What is your current address?	Open-Ended	
Were there any changes in dependents?	Yes or No	
Did your marital status change before the end of last year?	Yes or No	
Do you want to electronically file your tax return?	Yes or No	
Please list any questions or other concerns you might have.	Open-Ended	
Did you travel for business at any time?	Yes or No	

2. Enter the new question into the blank field and select "TYPE" option, either "Yes/No" or "Open-ended".




Questionnaire

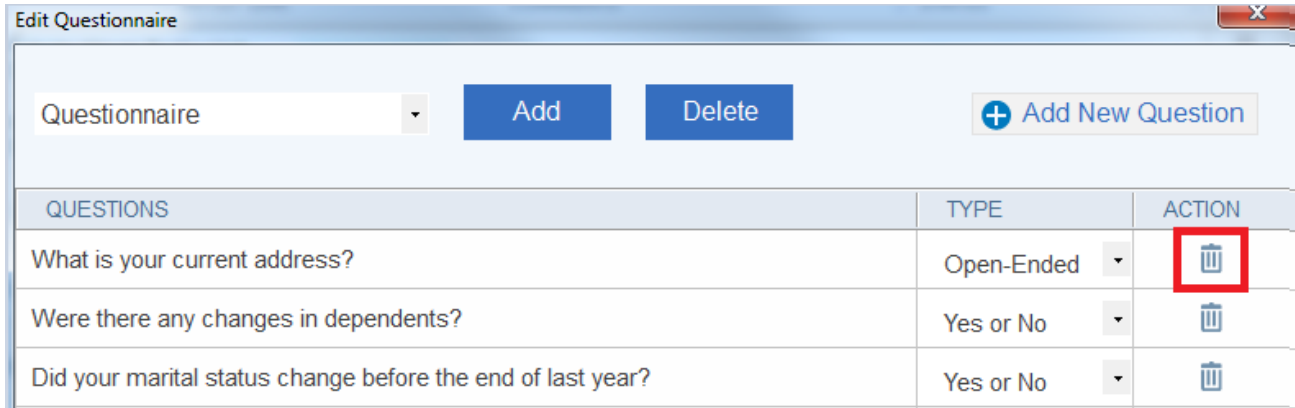
QUESTIONS	TYPE	ACTION
What is your current address?	Open-Ended	
Were there any changes in dependents?	Yes or No	
Did your marital status change before the end of last year?	Yes or No	
Do you want to electronically file your tax return?	Yes or No	
Please list any questions or other concerns you might have.	Open-Ended	
Did you travel for business at any time?	Yes or No	
<input type="text"/>	Yes or No	

3. Click the "Done" button.

The new question is added to the questionnaire.

## Deleting an Existing Question

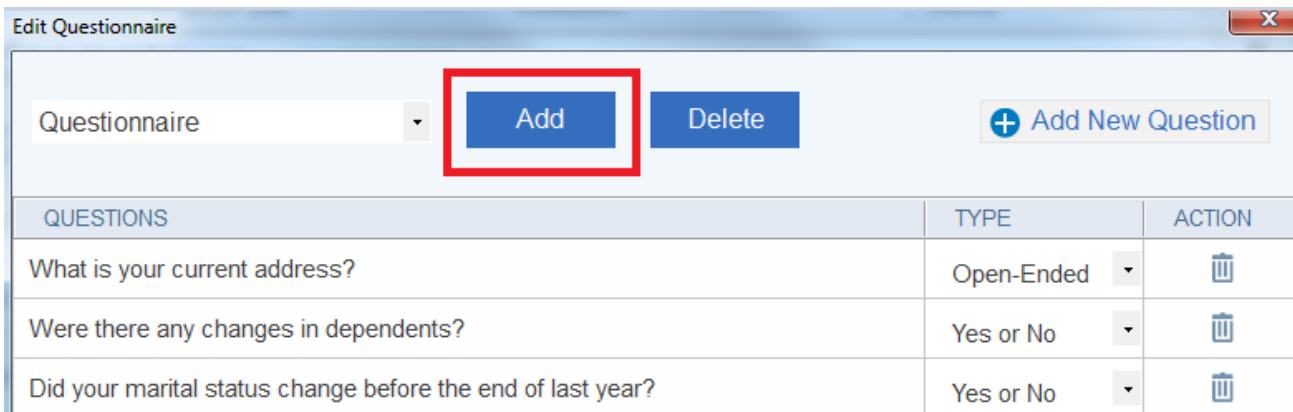
1. Identify question to be deleted from the questionnaire.
2. Click the trash icon  corresponding to the question.



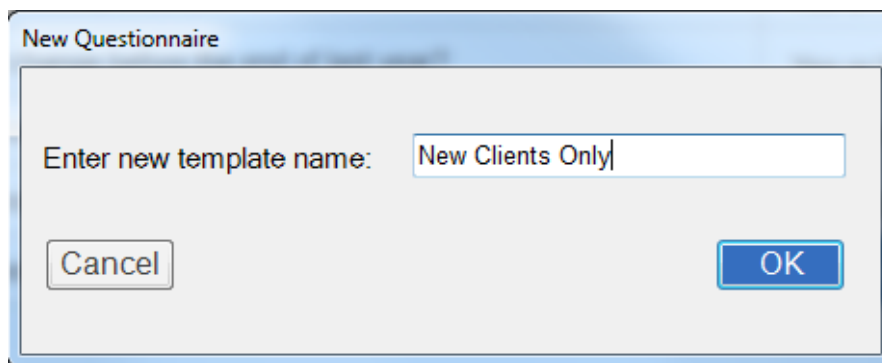
The question is deleted from the questionnaire.

## Creating a New Questionnaire Template

1. Add and delete questions to any questionnaire as necessary.
2. Click the "Add" button:



3. The "New Questionnaire" window displays. Enter name of new questionnaire template (e.g., "New Clients Only"):



4. Click the "OK" button; the new questionnaire template is ready to be populated with questions:

New Clients Only

QUESTIONS	TYPE	ACTION
	Yes or No <input type="button" value="v"/>	<input type="button" value="trash"/>

5. Add new questions and their corresponding response types.
6. Click the “Done” button; the template is added to the drop-down menu of existing questionnaires:


New Clients Only

QUESTIONS	TYPE	ACTION
Have you added any dependents this year?	Yes or No <input type="button" value="v"/>	<input type="button" value="trash"/>
Did you travel for business this year?	Yes or No <input type="button" value="v"/>	<input type="button" value="trash"/>
Did you purchase any foreign property?	Yes or No <input type="button" value="v"/>	<input type="button" value="trash"/>

## Deleting a Questionnaire Template

1. Select the questionnaire to be deleted from the drop-down menu.
2. Click the “Delete” button; the “Confirmation Message” window displays:

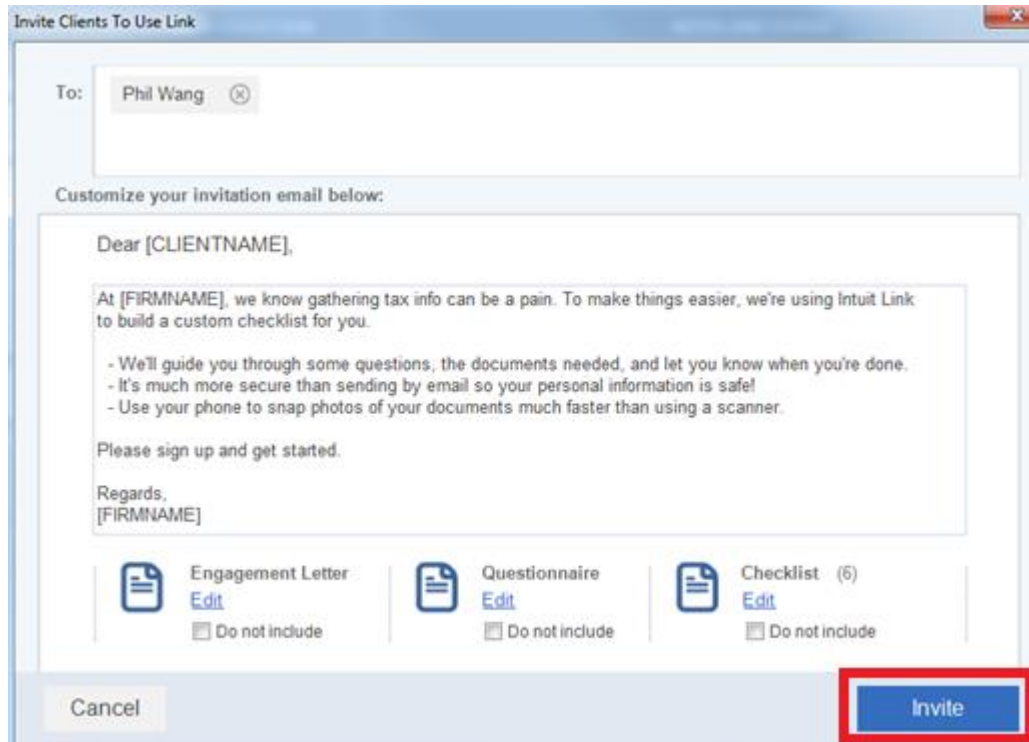
**Confirmation Message**

 Are you sure you want to delete this template?

3. Click the “Yes” button; the questionnaire template is deleted from the menu.

## Sending the Questionnaire

1. Make all necessary changes to the questionnaire (add question, delete question, etc.).
2. Click the “Done” button in the “Edit Questionnaire” window; the “Invite Clients to Use Link” window displays.



3. Click the “Invite” button in the “Invite Clients to Use Link”:

The questionnaire is sent to the client.