

Quick Reference Guide

This reference guide will provide you with tips, shortcuts and other useful information on using ProFile.

Activating ProFile Software

To activate ProFile tax year 2012 products (those purchased September 27th, 2012 onwards), from within ProFile go to **Help > License > Add New License** and follow instructions.

Updates

Our Automatic Check for Updates feature (**Options > Environment > System**) ensures that you have the latest ProFile version throughout the year. If you turn this feature off, be sure to regularly select **Online > Check for Updates**.

For greater control of updates on networks, clear the checkbox Enable automatic check for updates under **Options > Environment > System**.

Tips

- To carry forward your prior year files, select **File > Carry Forward**. From the drop down list, select the type of file to carry forward. Browse to the folder where your files are stored, and select a file. Premier customers can batch carry forward using the ProFile databases.
- ProFile has some great time-saving functions in the Options menu. Be sure to review and select your carry forward options before you carry forward your files (**Options > Module**). For information on how to share options on a network, visit our support website at profilesupport.ca.
- You can right-click on any ProFile form for a menu of options specific to that form or field.
- The Form Explorer lists every form and worksheet. Open any file and press **<F4>** to display the Form Explorer. There are four views to help you find forms.
- A Premier license includes Database File Management. Go to **Options > Database > Client Explorer** (recommended).

KEYBOARD SHORTCUTS

Function key only		Ctrl +	Shift +	Alt +
F1	Help	Field help (if available)	Form help	
F2	Override/restore calculation	Override format		
F3	Client Explorer			
F4	Form Explorer	Close current file	Form Explorer (Line No.)	Exit ProFile
F5	Switch to spouse (T1/TP1)	Switch to RSI view (T2)	Switch federal/QC forms	Switch family file (T1/TP1)
F6	Jump to first source form	Next open file	List of source forms	
F7	Form Explorer (Detail)		Form Explorer (Keyword)	Backtrack to prior form
F8	Attach memo	Attach calculator tape		Snapshot/variance
F9	Display next audit message	Show/Hide Auditor	Display prior audit message	Quick print audit messages
F10	Tax summary	Non-zero T1 summary	Two-year tax summary	Quick print tax summary
F11		EFILE return	Instant SEND	Quick print T183
F12	Print current form			

*ProFile also supports standard Microsoft Windows® shortcuts.

WHERE TO LEARN MORE

These are excellent sources of information – many are available 24/7.

Latest Product News

Go to **Online > Update Information** – includes What's New, What's Fixed, Known Issues, and News/Alerts.

QuickStart

Here you'll find central access to the many ProFile resources. If you do not see the QuickStart window when you start ProFile, go to **Help > QuickStart**.

Online Community

Get help from other tax professionals in ProFile's user-to-user Web forum by visiting community.intuit.ca.

<F1> Help

Press **<F1>** on any form or field to display related information in the help files.

Self-Serve Support

Visit ProFile's support website at profilesupport.ca for answers to FAQs, hot topics and more. In ProFile, choose **Help > Support > InfoBase**.

Contact our support team

Call **1-800-452-9970**.

Training

For all our training options, visit profiletraining.ca.

BACKUP OPTIONS

A regular backup routine could prove to be your best business practice!

- Options > Environment > File > Keep backup** will always keep a copy of your next-to-last file save (recoverable through Windows Explorer®).
- Options > Environment > File > Auto save files every X minutes** will save your current file at regular intervals.

AND MORE...

File properties<Ctrl+I>
T1, T2 jacket<Ctrl+J>
Carry forward a file<Ctrl+R>
Pause/start timer<Ctrl+T>
Next form<Ctrl+Tab>
Previous form<Ctrl+Shift+Tab>
Top of next slip<Ctrl+Enter>
Top of previous slip<Ctrl+Shift+Enter>
Ditto key (back apostrophe)
Next form Form Explorer checklist<Ctrl+Alt+PgDn>
Last form Form Explorer checklist<Ctrl+Alt+PgUp>
Next page on form<Ctrl+PgDn>
Previous page on form<Ctrl+PgUp>
Next section on form<Alt+PgDn>
Previous section on form<Alt+PgUp>
Clear review mark on field <Ctrl+Alt+0>
Preparer sign-off<Ctrl+Alt+1>
Partner sign-off<Ctrl+Alt+2>
Correction required mark<Ctrl+Alt+3>
Question review mark<Ctrl+Alt+4>
End review<Ctrl+E>
Erase highlighter<Ctrl+H>
Close current form<Esc>
Open form in new window <Ctrl+Alt+F6>
Quick print non-zero summary<Ctrl+Alt+F10>

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P/N 700904