ProFile Review Setup

There are 3 steps that you need to do to get started:

1. Enable sync in ProFile
2. Create an Admin/Company Account
3. Select and sync the returns that you wish to view in ProFile Review or ProFile Connect

Note: You will need your Order/Service Number and one License Key. You will find these on the ProFile receipt emailed to you by Intuit Canada.

Step 1:
Enable sync for ProFile Review and ProFile Connect

1. Open ProFile 2013. Click the new Enable Sync icon on the toolbar, shaped like a cloud.

2. The cloud icon changes to orange, indicating that you’ve enabled syncing. You’re also asked if you want to create an Admin Account. Click OK to continue. (You may need your Office Manager or Software Administrator to set up the Admin/Company account first, and then invite you).
Step 2: Create an Admin/Company Account

Note: You will need your Order/Service Number and a License Key to complete the next step.

1. When you turn on syncing, the Manage Online Account window appears. ProFile also opens a browser to the Create a Company with ProFile Review web page.

2. **If you already have an Intuit Online account**: In the Create a Company with ProFile Review page, enter your Service/Order Number and License Key, along with your existing account information (email address and password).

   Note: If your security or virus software asks you to confirm that you are connecting to a valid Intuit domain, do so.

3. **If you do not have an Intuit Online Account**: Click the link to create a new account instead. You must choose a security question to help recover your password if you lose it. The email and password that you enter will be the login credentials that you use for ProFile Review, ProFile Connect, and the Manage Online Account window in ProFile desktop (which you’ll use to configure the files that you sync online).
4. Your Order/Service Number and License Key are on your ProFile receipt. The location of this information depends on whether you purchased ProFile through a telesales agent or online via our web site.

If you purchased ProFile from our web store, look for the Order Number and License Key:

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Checkout
Thank you for your purchase
Please print this confirmation page for your records. Your order confirmation will be sent to your email shortly. If you require technical support, please go to support.intuit.ca/profile.

Customer Name: november fifteen twenty thirteen
Order Number: 5448317467
Order Date: 15-11-13 (dd-mm-yyyy)

Billing Address
northern fifteen twenty thirteen
50 emperor lane
gotham city, AB
CA, state

ProFile License Information - PLEASE READ

RETURNING Customer;
Step 1. Download the new ProFile product by going to Online > Check for Updates
Step 2. Go to Help > License > Add New License
Step 3. Follow dialog boxes to activate product(s)

If you require additional help, read the Installation & Product Activation instructions

NEW Customer;
Step 1. Go to Download ProFile webpage
Step 2. Follow the instructions under "Instructions for NEW Customers"
Step 3. Once in the product, follow dialog boxes to activate product(s)

Alternatively, you may activate by calling us at 1-800-452-5970.

Item
ProFile Quebec Tax Suite Premier
Download
Required to activate your product(s):
Product Code: 413-354
License Key: 780014331438219

<table>
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Sub-total: $3,300.00
GST: $176.00
PST: $0.00
HST: $0.00
Total (CAD): $3,496.00
Total Savings: $60.00

Returning your purchase
```
Step 2: Create an Admin/Company Account

If you purchased ProFile from a telesales agent, look for the Service Number and License Key:

5. You’ll receive confirmation of your registration and are shown the remaining steps needed to complete ProFile Review setup.
After you create your account and are taken to ProFile Review, you’re reminded to select the files that you want to sync from ProFile desktop.

1. Return to ProFile desktop. If the Log In To Your Account window is not open, go to the Online menu and click Manage Online Account. (This window was automatically opened when you enabled syncing with the cloud button).

2. Enter the same User Name (email address) and Password that you just used to create your ProFile Review Admin/Company Account.

3. In the Manage Your Files window, select the tax year of the returns that you want to sync.

Note: ProFile Review supports only current-year returns. ProFile Connect supports both 2012 and 2013 year returns.

4. Click Select Folder and navigate to the file folder with the returns that you want to access from ProFile Connect or ProFile Review. ProFile will update the Folder Location field with the location that you select.
5. If your files are password-protected, enter the password in the password field below the Folder location and select the Use same password for all password protected files checkbox.

When you’re done, click Next.

6. The Sync Your Files window appears. Click Sync.

7. Your files will now sync to the cloud. You’ll receive feedback depending on whether your files successfully synced. Close the window (click X in the top right corner) if you are satisfied with the results.

8. You can now access your files with ProFile Connect or ProFile Review.