

The options selected by default when you first install ProFile work well for most preparers. However, you may want to set certain options to make ProFile work even better for your business.

This document will cover key options you can set to work more efficiently. Inside ProFile, you will find many more options. Remember, whenever you have a dialog box open on your screen, you can always get more help on a particular option. Simply click the small question mark that appears in the upper right corner (beside the close box) and then click the description of the option in the dialog box. A small pop-up window will explain what the option does and why you might want to use it.

At the end of this document, we have provided a list of questions you may have as you read this document. For each question, you will see related search terms. Use these search terms in InfoBase at [www.profile.intuit.ca](http://www.profile.intuit.ca) or in the ProFile online help system under the Help > ProFile Help menu.

**Read this document to learn how to:**

- Set up ProFile to work in the way you want to.
- Share your options with other preparers.
- Keep a backup of your options or move your options to another computer.

# Learn How to Set Options in ProFile

## Table of contents

Carryforward and new file options ..... 2

Contact information ..... 2

Set a file template ..... 2

File locations..... 2

Backup, autosave and password..... 2

Backup your options..... 3

Move a copy of an Option package ..... 3

Share your Option package..... 3

Save changes to an Option package..... 4

Point to an Option package on another computer ..... 4

Manage options for a laptop on and off the network ..... 4



Intuit  
Telephone 1.800.452.9970  
Fax 1-888-829-1724  
[www.dfc.Y.intuit.ca](http://www.dfc.Y.intuit.ca)

## 1 Options to automatically complete fields

Using options, ProFile can automatically complete certain data fields in all your client files. To take advantage of this feature, you need to set those options at the beginning of tax season, before you carry forward or create any files. If you don't set these options, you'll have to complete those fields manually in every file you create. You can save a great deal of time by setting these options before you work with your files.

### Carryforward and new file options

On the **General** tab of **Options > Module**, set options for automatically completing certain fields in all new files you create and all files you carry forward from a prior year. For example, you can choose to always carry forward the answer to the *Elections Canada* question on the first page of the T1 jacket. Or, you can choose to always include and print the T1013 authorization form in each new file.

### Contact information

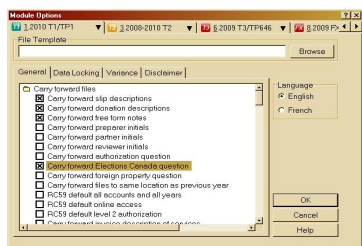
Enter contact information for you or your firm on the **Preparer** tab of **Options > Environment**, ProFile automatically inserts this information in each file. In ProFile T1, you can view it in the **Preparer Information** section of the Info form, where it flows to the fourth page of the T1 jacket.

### Set a file template

If you do not find an option for automatically completing a particular field on the **Options > Module** dialog box, you can create a template of your ProFile file and then have ProFile start with this file each time you create a new return. For example, if most of your clients reside in Saskatchewan, you can save time by creating a template file in which the province of residence is set to Saskatchewan.

To create a file template:

- 1 Open a new ProFile T1 2009 file.
- 2 On the Info form, enter SK in the Province field.
- 3 Save the file. Give it a name that makes it easy for you to remember what the file is for, such as Template, and remember where you saved the file.
- 4 Go to **Options > Module** and click once on the T1 2009 tab at the top of the window.
- 5 Click the [Browse] button next to the File Template field.
- 6 In the dialog box that pops up, click on the file you just created and click [Open].
- 7 You will now see a path to the template file in the File Template field. Click [OK] to save this path.
- 8 Now, create a new T1 2009 file. Notice that the Province field now says SK and the Province of residence is Saskatchewan.



Set a file template as well as options for new and carryforward files under

## 2 File-management options

Use the options under **Options > Environment** to set options that affect the way you work in all ProFile modules.

### File locations

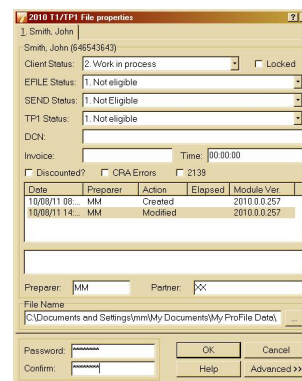
Set where you want to save each type of ProFile file on the **File** tab. By default, ProFile saves files in separate folders for each module and year in a folder called My ProFile Data in your My Documents folder. If you work with several preparers in one office and you usually save all your files on a centralized file server, you will need to tell ProFile where to save your files. To do this, click once in the **Directory** column and then click the [...] button to browse to the folder where you want to save your files on the server.

If you don't change this option, each time you save a new file, you will need to tell ProFile to save your file on the server. If you change your mind and set a new file location later on in the season, you will have to

### Backup, autosave and password

Set backup, autosave and password options on the **File** tab:

- Select **Keep Backup** to make a copy of the current file each time you save it.
- Select **Auto save files every** to make a copy of the current file at the specified interval (in minutes).
- Select **Allow Password** to be able to enter a password for each file on the **File > Save** or **File > Properties** dialog boxes.



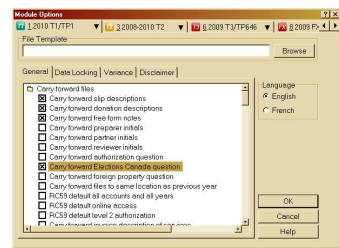
If you selected **Options > Environment > File > Allow Password**, you can enter and confirm a password to protect a tax return from unauthorized access. Do not lose your password as there is no way to retrieve a password protected file without it!

### 3 Billing options

In ProFile T1 and ProFile T1/TP1, you can use ProFile to help you calculate charges for your clients. You can invoice your clients using an hourly rate, a flat rate, or according to which forms/slips you complete.

Set billing options under Options > Pricing at the beginning of the tax season to make sure that they are set in each file you create or carry forward. If you don't set these options, you will need to complete the related fields on the Billing form for each file.

- Enter the **Next invoice number** if you will use ProFile to generate invoices for your clients. ProFile automatically inserts this number on the invoice and automatically increments the number each time you create a new file.
- Choose the **Invoice type** to use by default. The **Detailed** invoice lists all forms and separate charges. The **Brief** invoice just provides a total.
- Choose how to calculate charges, by **Schedule** or by **Hour**. Select both if you generally bill by the hour but also charge extra for completing certain types of forms. If you plan to track the time you work on each file, don't forget to select **Use Timer** under Options > Environment > Edit.



Common-law clients separately or together as a couple. To combine the charges for both spouses onto one invoice, select **Joint Invoice** on the **General** tab under **Options > Module**. The joint invoice form is called JInvoice.

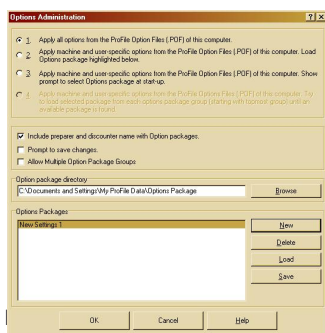
### 4 Options administration

Once you set up your ProFile the way you like it, you can store the configuration in an Option package. This moves your settings outside the local Windows® registry for your workstation so you can easily share them on a network or include them in your regular backups.

#### Backup your options

To create a backup of your options:

- 1 Go to Options > Options Administration.
- 2 Select **Include preparer and disclaimer name with Option packages** to save the office information entered under Options > Environment in the Option package.
- 3 Click the [New] button at the bottom left of the dialog box.
- 4 Enter a name for the Option package. Name the package something that will help you remember what it contains. Since this is a backup, it is a good idea to include the date of the backup in the name. For example, *Backup. 20031231EK* would indicate a package created on December 31, 2003 by a preparer with the initials EK.
- 5 Click [OK]. It may take a few moments for ProFile to save the Option package. Once the package is ready, its name will appear in the **Option Packages**



#### Move a copy of an Option package

ProFile saves each Option package into its own folder. Inside the folder, there are several files containing the settings for each module you own and for the ProFile program.

Since Option packages are folders and files on your computer, you can move or copy them just like you do any other files or folders on your computer, using Windows® functions.

- 1 Go to Options > Options Administration and take note of:
  - a Where your Option package is saved. This is the path in the **Option package directory** field.
  - b The name of the Option package you want to copy or move.
- 2 In Windows® Explorer, go to the folder you noted in step 1a. You will see one or more folders inside this folder. Each of these folders is an Option package.
- 3 Find the folder with the same name you noted in step 1b. Right-click on the folder and select **Copy**.
- 4 Browse to the folder on the network or the computer where you want to paste the file. Then, right-click and select **Paste**.

You can also burn that folder to a CD or save it to a diskette if you need to move it to a computer that is not on the network.

#### Share your Option package

If you saved an Option package on your computer and you want to allow others to use it, you must share the folder through Windows® functions:

- 1 Go to Options > Options Administration and take note of:
  - a Where your Option package is saved. This is the path in the **Option package directory** field. By default,
  - b The name of the Option package you want to copy or move.
- 2 In Windows® Explorer, go to the folder you noted in step 1a. You will see one or more folders inside this folder. Each of these folders is an Option package.
- 3 Find the folder with the same name you noted in step 1b. Right-click on the folder and select **Sharing and Security**.
- 4 In the dialog box that appears, select **Share this folder** and click [OK].

If you saved an Option package on a server on your network and you want to allow others to use it, you will need to check with your network administration to ensure that everyone who needs to use the Option package can access the folder where it is stored.

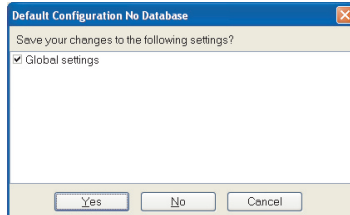
## Save changes to an Option package

If you make changes to your options and do not save them to the Option package, you will lose them when you exit ProFile.

To avoid losing your options, you can select the option Prompt to save changes under Options > Options Administration. ProFile will remind you to save changes to your configuration when you exit ProFile.

If you do not use the [Prompt to save changes](#) option, you can modify an existing Option package:

- 1 Make changes to your configuration under the Options menu.
- 2 Go to Options > Options Administration.
- 3 Click once on an Option package in the list at the bottom of the dialog box.
- 4 Click [Save].
- 5 Click [OK] to close the dialog box.



If you select Prompt to save changes, ProFile will display a confirmation box before you exit ProFile or when you load a new option package. This dialog box asks you whether you want to save the changes you made during your work to the option package.

## Point to an Option package on another computer

If another preparer in your office has shared out his or her Option package or if you have stored your package on a central file server, you need to tell ProFile where to find that package.

- 1 Find out where the Option package is stored on the network. You will need to know the full network path and the name of the Option package.
- 2 Go to Options > Options Administration.
- 3 At the top of the dialog box, choose how to load Option packages:
  - a Select 2 if you will always use the same Option package. This saves your configuration in an Option package and loads the selected package in the list at the bottom of the dialog box each time you start ProFile.
  - b Select 3 if you need to switch between Option packages frequently or if several preparers use the same computer. This saves your configuration in an Option package and lets you select which package to use each time you start ProFile.
- 4 Click the [Browse] button next to the Option package folder field.
- 5 Browse through My Network Places > Entire Network to the computer and folder where the Option package is saved.
- 6 Click once on the folder that contains the Option packages to highlight it and click [OK].

The full network pathway (in UNC format) will appear in the [Option package directory](#) and a list of Option packages stored in that folder will appear at the bottom of the dialog box.

- 7 Select the Option package you want to use and click Load.
- 8 Click [OK] to close the dialog box and save your options.

### Options password

Whether you configure ProFile options at each workstation, or use Option packages to share your settings, you may want to protect unauthorized modification of these options.

To password protect your configuration settings select Options > Options Password.

To remove the password, select Options > Options Password again, enter your Old password but leave the New "Password" and "Confirm" fields blank.

## Manage options for a laptop on and off the network

If you point your laptop to an Option package folder on a network, once you disconnect your laptop from the network to take it home, you will no longer have access to the Option packages in that folder. However, you can set up ProFile to use an alternate, (that is, on the laptop's hard drive) local group of Option packages. ProFile first looks for the Option package folder on the network and then, if that folder is not accessible, it selects the next Option package folder in the list.

One instance where this might be useful is for the file locations set under Options > Environment. When the laptop is [connected](#) to the network, you will want to store your files on the network and when the laptop is [not connected](#) to the network, you can specify a default directory on the laptop itself. However, please be aware that by having two different sets of options you are using two different databases. Files created when you are disconnected from the network will not be listed in the database stored on the network.

Also be aware that this option is designed for offices that already have a set of standard options. If you are still establishing a standard set of options for yourself or your office, you will need to re-save your option package on the network as well as on your laptop whenever you make changes to ProFile options. ProFile does not synchronize changes between the two.

- 1 Find out where the Option package is stored on the network. You will need to know the full network path and the name of the Option package folder.
- 2 Go to [Options > Options Administration](#).
- 3 Select [Allow Multiple Option Package Groups](#). This expands the dialog box so that you can set multiple options package groups. By default, the path that was in the [Option package directory](#) field becomes the path for the option package group.
- 4 Select option 4 at the top of the dialog box.
- 5 Click once on [Default](#) under the [Group Name](#) column and type a descriptive name for the group. For example, "Network," if this group is only accessible when your laptop is connected to the network.
- 6 Click once in the path under the [Folder](#) column and then click the [...] button. Browse through My Network Places > Entire Network to the folder that contains Option packages.
- 7 Click [\[New\]](#) to create a new group.
- 8 Type a name for the group. For example, "Local", if you use this group when your laptop is not connected to the network.
- 9 Click once in the blank field under the [Folder](#) column and then click the [...] button. Browse to the folder on your laptop that contains Option packages. By default, ProFile stores option packages in C:\Program Files\Profile\Settings.
- 10 Click [\[OK\]](#) to close the dialog box and save your options.

ProFile will now look for option packages first on the network and then on your laptop. It is very important that the network folder appear above the local folder in the list of [Option package groups](#). Since ProFile tries each Option package group in the order they appear, if you set the local Option package folder above the network folder, ProFile will always use the Option packages on your laptop instead of those on the network, even when the laptop is connected to the network.

If you need to change the order of the groups, you can click and drag on an Option package group to move it. Or, you can use <Ctrl + Up Arrow> or <Ctrl + Down Arrow> to move the selected Option package group.

## 5 Related information

Use the following list of questions to help you know what terms to search for in our electronic documentation. Use these search terms in InfoBase at [www.profile.intuit.ca](http://www.profile.intuit.ca) or in the ProFile online help system under the Help > ProFile Help menu.

### Question:

- How do I make the Preparer information on the Info form update automatically when I make changes under Options > Environment?
- How do I set up my billing options?
- How do I choose what types of audit messages I see in the Auditor?
- How does ProFile calculate hourly billing for portions of an hour?
- How do I make sure I don't accidentally change the information in my files after I have filed them?
- Can ProFile tell me when there is a major change in a client's file from one year to the next?
- How do I change the default language in ProFile?
- How do I set up ProFile to EFILE tax returns?
- How do I select which forms to print?
- How do I set up the Client Explorer and Database options?
- How do I configure ProFile to work on a network?
- How do I move files so that the Client Explorer and Classic Database still know where they are?

### InfoBase and Online Help search terms:

preparer  
Invoice, timer, billing  
audit  
timer  
data locking  
variance  
language  
EFILE, options  
form selection  
database, configuration, Client Explorer  
network  
move files