ANDERS
CPAs + ADVISORS

HubSync

HUBSYNC CLIENT USER GUIDE

The HubSync Prepared By Client (PBC) module is Anders tool designed to streamline the collection and organization of client data. In this guide, you will find information on how to log in and navigate the HubSync portal.

To navigate to a specific section of this guide, simply click on that section or topic title, from the Table of Contents.

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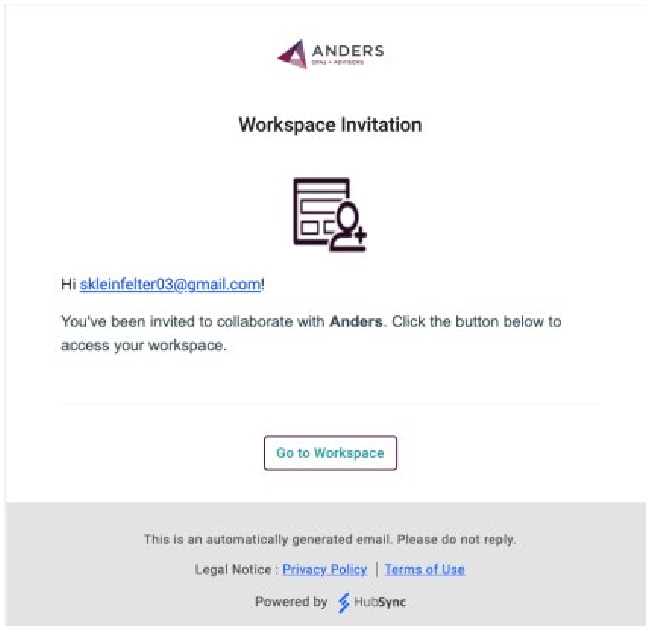
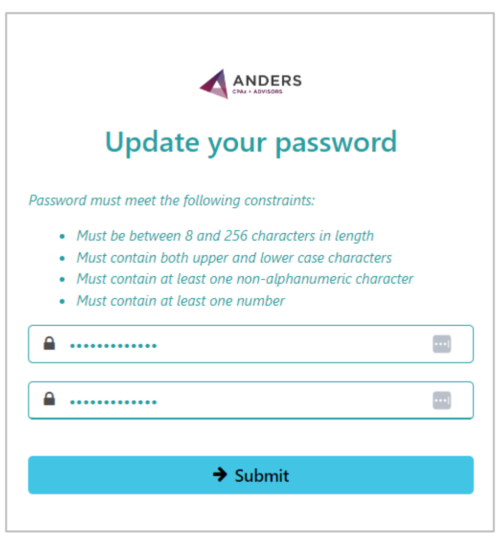
HOW TO SIGN UP

Step 1: Invitation Email - You will receive an invitation email to create your workspace for the HubSync portal. Please follow the on-screen prompts to create your secure account.



Step 2: Create Password - To finish creating your account, enter a password that meets all the requirements listed. When complete, click "**Submit**."

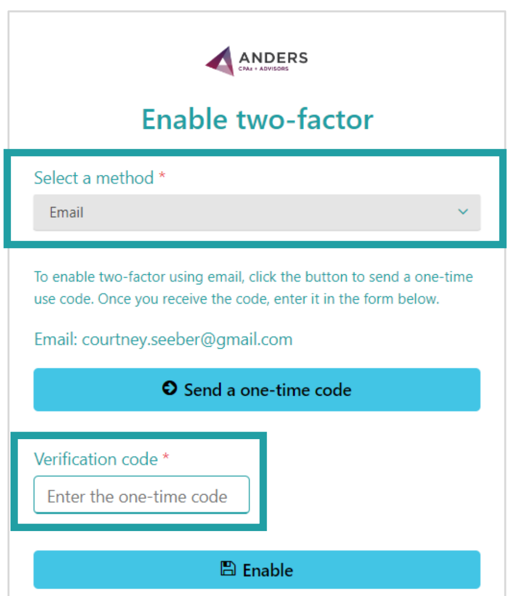
NOTE: *Your portal username is automatically set to your email address at which you received the HubSync Workspace Invitation.*



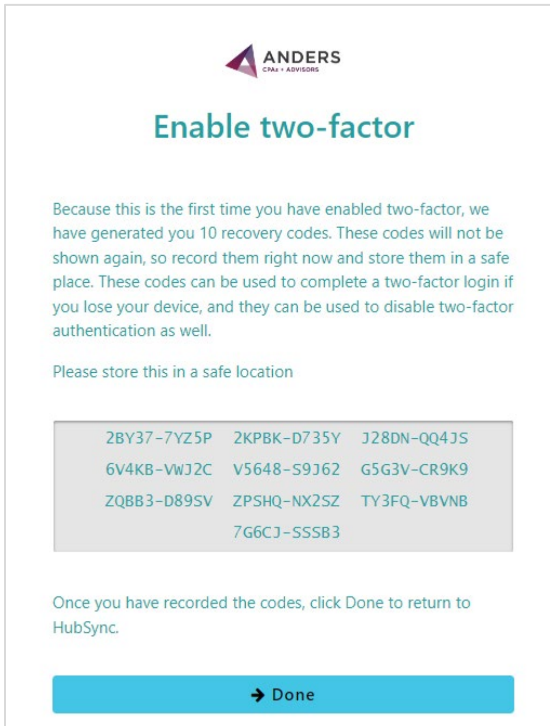
Step 3: Complete Registration - Confirmation of password update will be displayed on the next screen with a request to log in. Enter your First and Last Names on the next screen.

Step 4: Enable Two-Factor Authentication - For your security, two-factor authentication must be established.

- First, select a method from the drop-down menu - Email or SMS.
- Next, click on "**Send a one-time code**" to receive a verification code either by email or text (whichever was selected in Step #1). Enter the verification code in the open text space under "**verification code**" and click "**Enable**".



- **Two-factor Authentication Recovery Codes** The system will produce 10 recovery codes for your safekeeping, in the event you lose your device. Please store these in a safe location. Click “**Done**” to complete your registration and access your client portal.

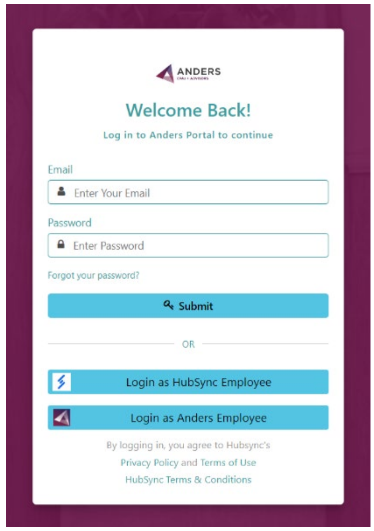


HOW TO LOG IN TO HUBSYNC

Login Site – https://anders.hubsync.com/

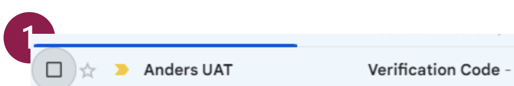
Logging In

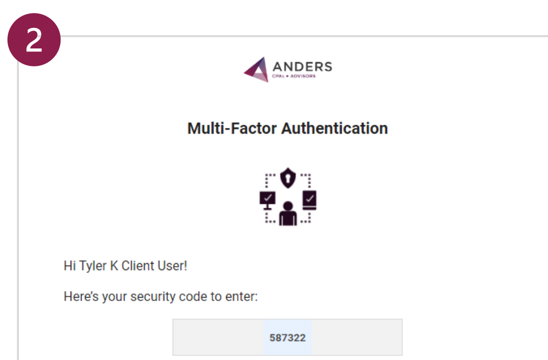
Access the HubSync platform by visiting the login site. Enter your credentials to log in.



Verification Code Process

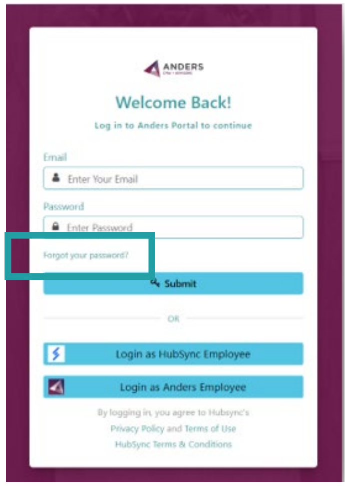
For added security, you may be required to enter a verification code that will be sent to your email. Follow the prompts to complete this process.



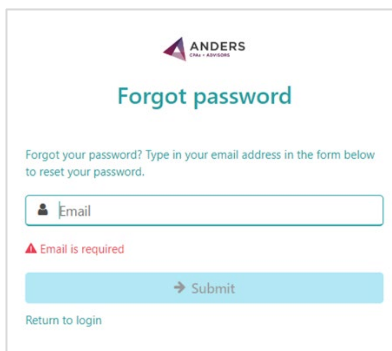


Resetting Your Password

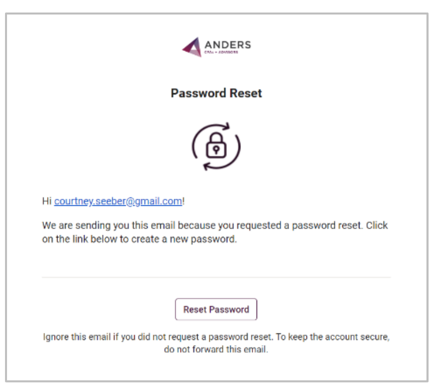
Step 1: Click on “Forgot Password” on login screen.



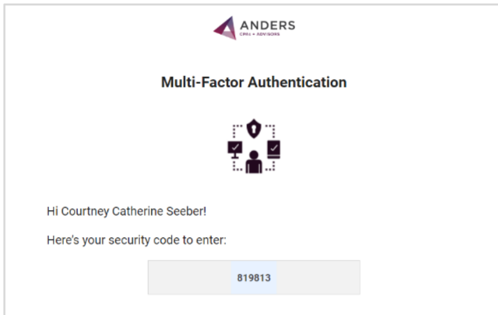
Step 2: You will be redirected to input the email address that you used during sign-up.

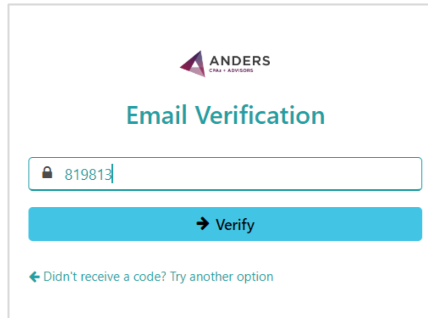


Step 3: An email will then be sent containing a link that will allow you to reset your password. Please click “Reset Password” to create new password.

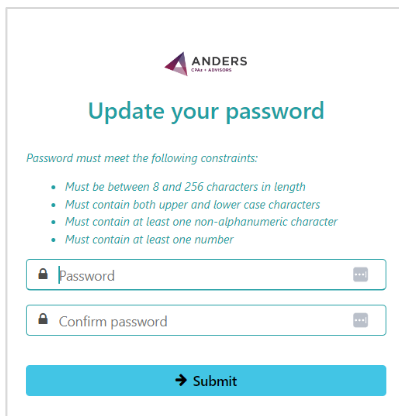


Step 4: After clicking "Reset Password" from the first email you received, you will receive another email with a verification code. Please enter the verification code that was sent to your email.



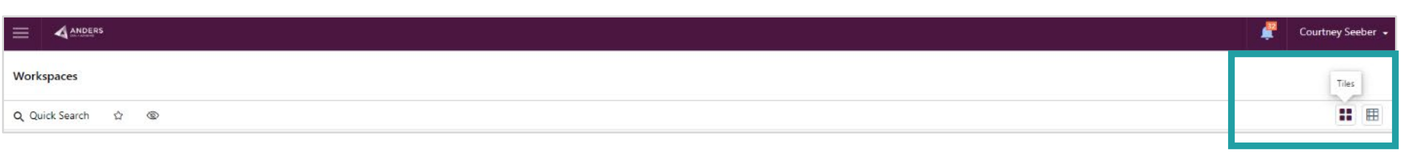


Step 5: After the code is verified, update your password and click "**Submit**."



SETTING UP HOMEPAGE VIEWS

Choose between a tile view for a more visual layout or a grid view for a list format to organize and view your files and tasks.



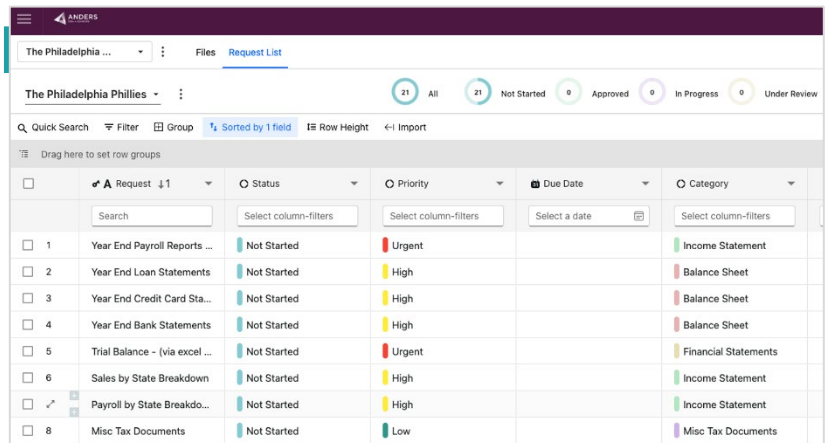
MANAGING YOUR WORKSPACE

From inside a workspace, you will see the following informational tabs across the top, next to the Project name:

- **Files**: Store and manage all your documents within each workspace.
- **Request List**: Track and manage requests or tasks assigned to you or your team.

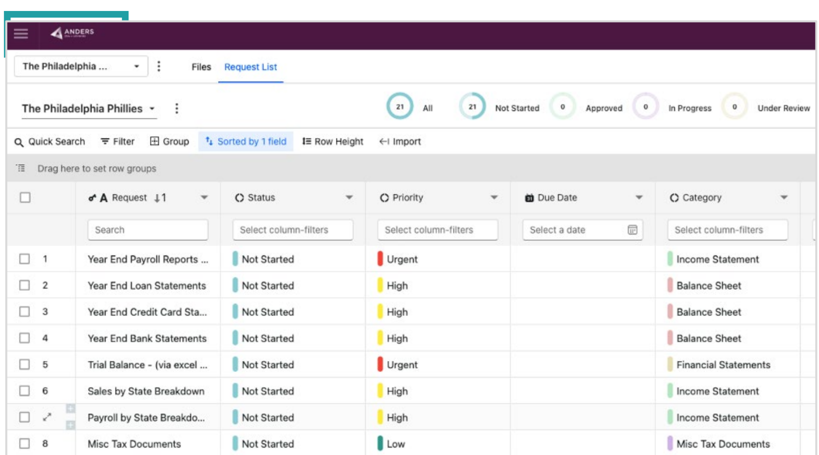
Navigating Between Multiple Workspaces

From inside a request list, you can easily access other workspaces that you have access to, by clicking on the drop-down arrow in the top left side of the screen.



Navigate Back to the Homepage

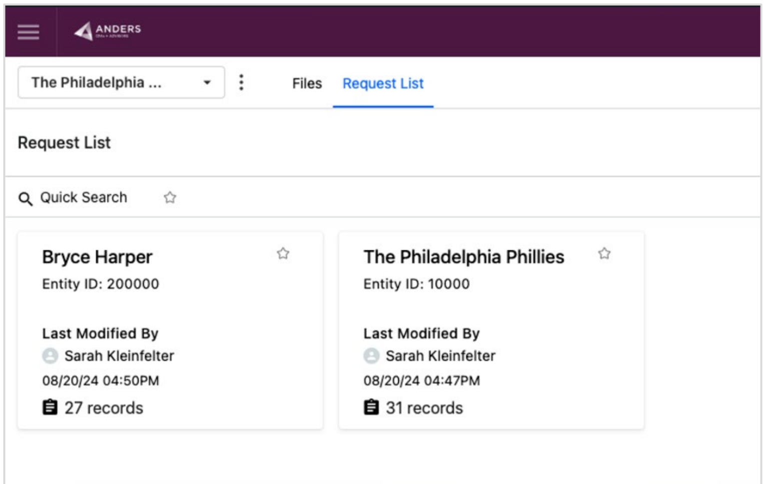
Click on the Anders logo near the top left side of the screen to return to your homepage.



WORKING WITHIN THE REQUEST LIST

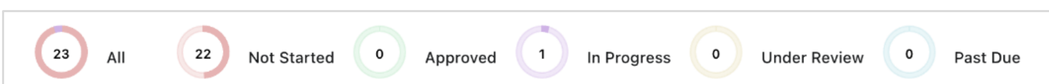
From the Request List area, view and manage individual requests or tasks, including:

- **Request List**: This is a list of Items that are needed by Anders to perform the requested work. From here, you can see your different projects.



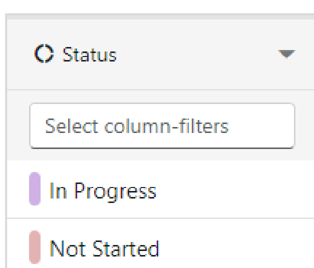
KEY TIP

- **Status Dashboard**: The Status Dashboard displays the various stages your projects may be in. Click on a status to see all items currently in that stage.

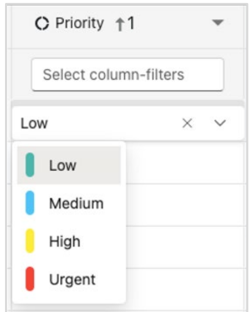


- **Status**: From the Status column, view the current status of each request (e.g., not started, in progress, completed).

  NOTE: The status will automatically be moved from ‘Not Started’ to ‘In Progress’ when an attachment is uploaded for that line item. Statuses can be filtered by clicking on the icons at the top of the Request List.



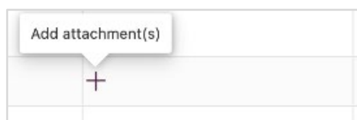
- **Priority**: Review the document priority levels assigned by your Anders team to help you manage document uploads and keep your projects moving forward.



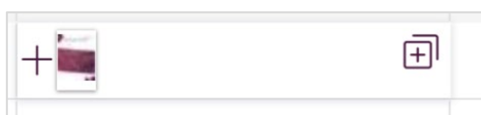
- **Due Date**: Review due dates to keep track of deadlines.

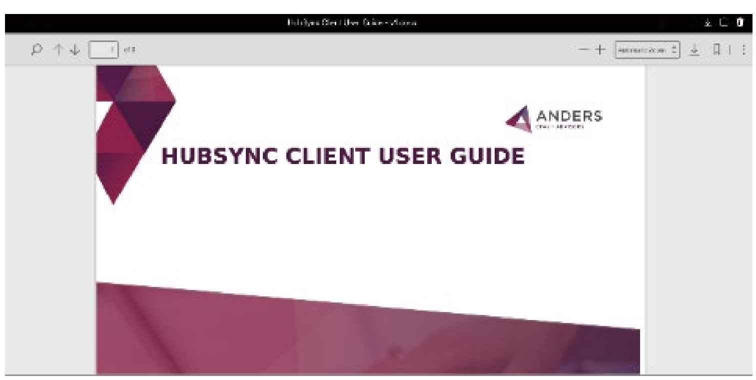
KEY TIP

- **Uploading Documents:** Attach relevant files to requests for easy access. To upload a document either drag and drop directly into the cell/grid or select the '**+**' button the cell. All file types can may be uploaded as attachments such as .PDF, .JPEG, XLS, .DOC.



To preview the uploaded document from the grid, *click* on the desired document and a preview will show in the UI:

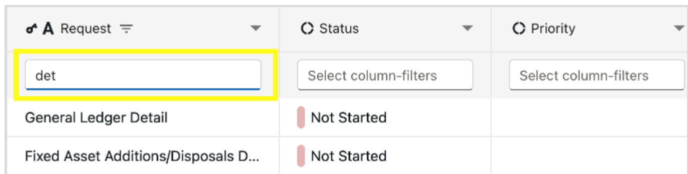




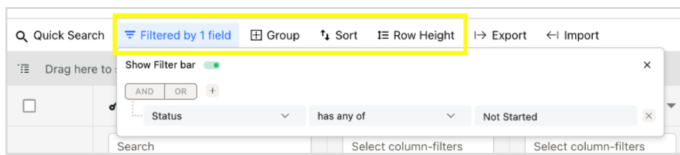
- **Assigned To**: Assign requests to specific team members.

  NOTE: You can only assign Requests for those that have access to the workspace.

- **Grouping, Filtering and Sorting**: Inside each Request List, you have the option to group, filter or sort your data. You can either use the global bar at the top …

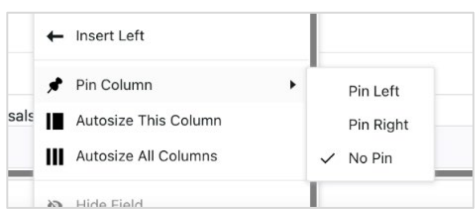


-OR- use the in-line grid filters to manipulate and view your data easily.

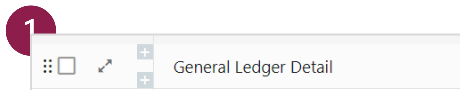


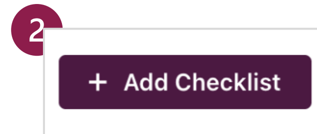
NOTE: In-line filters do **not** clear unless you remove them.

- **Pinning Columns**: Using the carrot drop-down on the column header you can pin columns left or right.

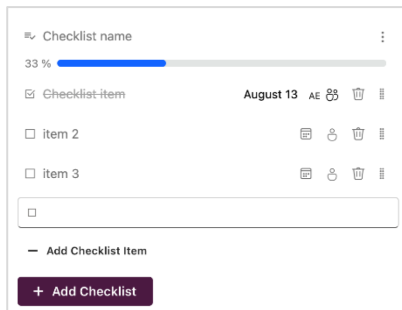


- **Checklists**: Each row or record can have its own checklist. To add a checklist, expand the record and then click the “+ Add Checklist button to create your own custom checklist.

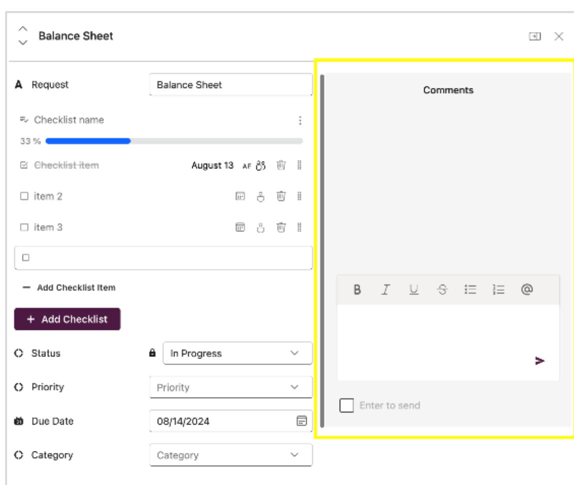




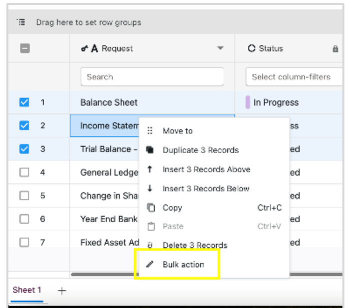
NOTE: Users can add multiple checklists on each record. Each checklist can have a due date and assigned person. When a checklist item is marked off or completed, the progress bar is updated and item is struck through.



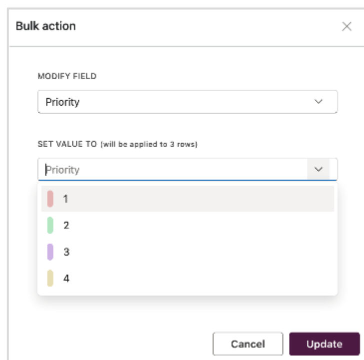
- **Messages/Comments on a Request Item**: Communicate about specific requests directly within the item. To message and comment at the record level, expand the record. On the right-hand side, enter comments/messages in the open text box. Option to tag people with notifications.



- **Bulk actions:** To update multiple rows at once, select desired rows on the left, and right click anywhere in the grid and select "*Bulk Actions*".

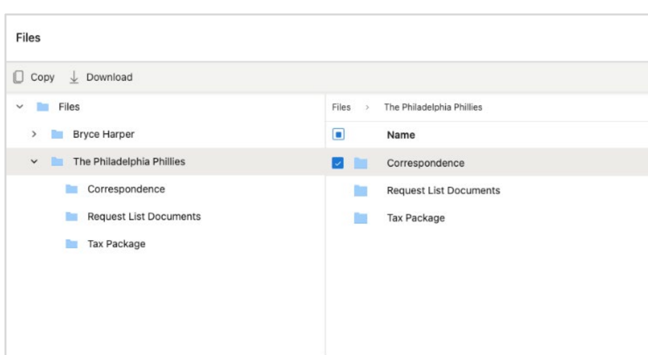


Next, select the column to perform the bulk action on, and the value that records should be updated to.



WORKING WITHIN THE FILE AREA

From the File Area, view files associated with a project. Download files directly to the workspace, as needed. To upload files, either Drag and Drop files into a folder or click the "**upload**" button.

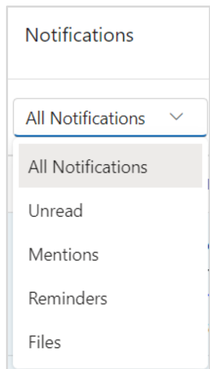


NOTIFICATIONS

Viewing Notifications

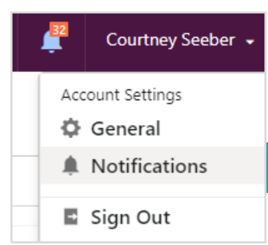
From the dashboard, you can see if there are notifications on any of your items or tasks if there is a red number on the top of the "bell" icon on the top-right corner of the screen.

Click the "bell" icon to view all notifications. Select to view **All Notifications**, **Unread**, **Mentions**, **Reminders** or **Files**.



Type into the "Search Notifications text box to search for a specific notification.

Email Notifications Preferences



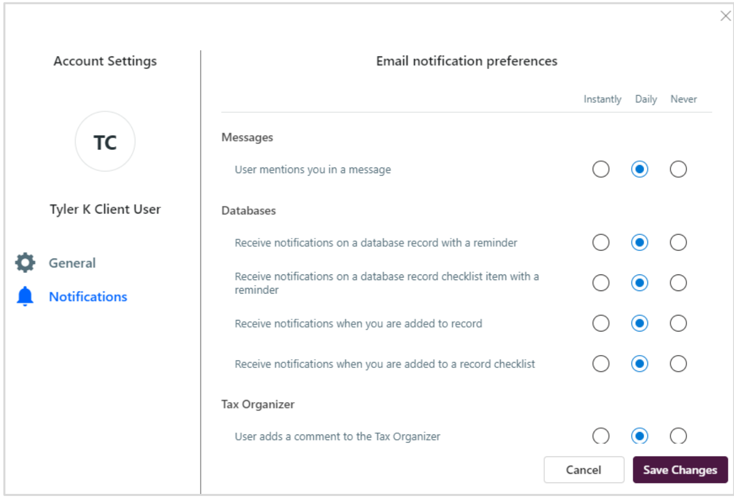
In the top right corner, next to your name, click on the drop-down arrow and select *Notifications* to update your email notification preferences.

Choose from the following options:

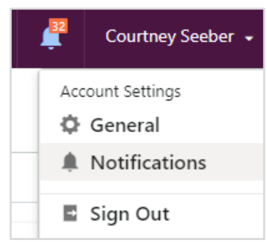
- **Instantly** – Receive notifications as soon as they occur.
- **Daily** – Receive a daily summary of notifications.
- **Never** – Turn off notifications.

Once complete, click ***Save Changes***.

Customize which types of notifications you receive based on categories (Messages, Databases, Tax Organizer).



MANAGE YOUR USER SETTINGS



In the top right corner, next to your name, click on the drop-down arrow and select *General* to update your user settings.

The following items can be modified:

- **Name Update**: Update your name in the system.
- **Update Email Address**: Change your email address associated with your account.
- **Change Password**: Update your password for security.
- **Reset MFA**: Reset your multi-factor authentication settings.