



**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.

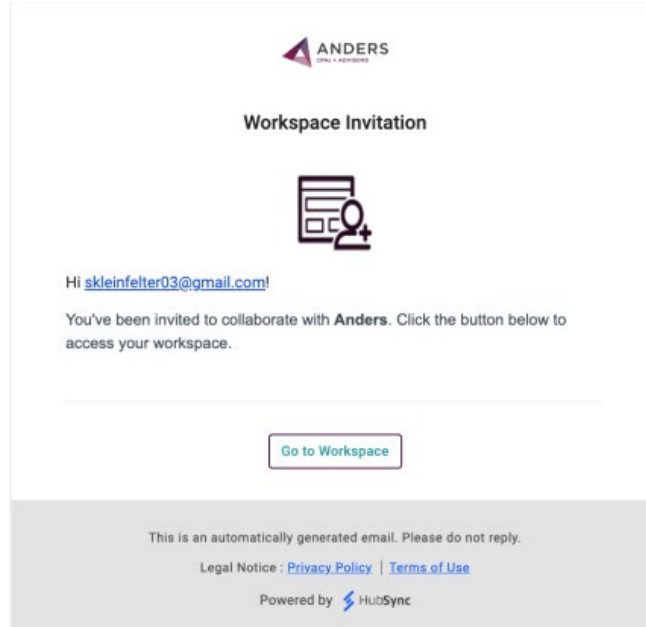
---

## TABLE OF CONTENTS

HOW TO SIGN UP.....	2
HOW TO LOG IN TO HUBSYNC .....	5
SETTING UP HOMEPAGE VIEWS.....	7
MANAGING YOUR WORKSPACE .....	8
WORKING WITHIN THE REQUEST LIST .....	9
• Status Dashboard.....	9
• Uploading Documents .....	10
• Assigned To.....	11
• Grouping, Filtering and Sorting.....	11
• Pinning Columns.....	11
• Checklists .....	12
• Bulk actions .....	13
WORKING WITHIN THE FILE AREA.....	13
NOTIFICATIONS .....	14
MANAGE YOUR USER SETTINGS.....	15

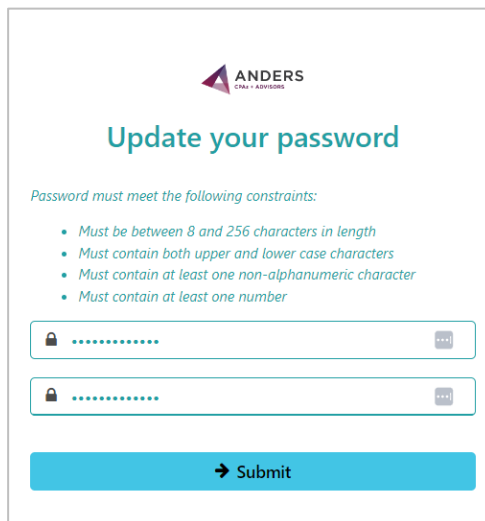
## HOW TO SIGN UP

**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.

The image shows a screenshot of a password update form. At the top is the ANDERS logo. Below it is the title "Update your password" and a list of constraints: "Password must meet the following constraints: Must be between 8 and 256 characters in length, Must contain both upper and lower case characters, Must contain at least one non-alphanumeric character, Must contain at least one number". There are two password input fields with lock icons and toggle buttons. At the bottom is a blue "Submit" button.

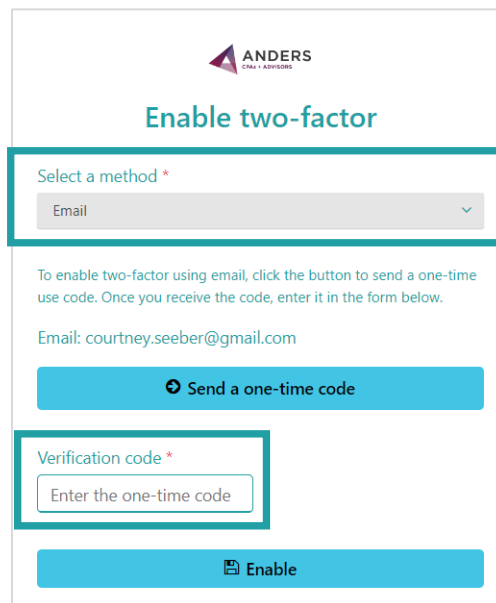
**Step 3: Complete Registration** - Confirmation of password update will be displayed on the next screen with a request to log in. Enter your First and Last Names on the next screen.



The image shows a screenshot of the HubSync 'Complete registration' form. At the top is the HubSync logo. Below it are two input fields: 'First name' and 'Last name', each with a person icon on the left. At the bottom is a blue 'Submit' button with a magnifying glass icon.


**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”**.



The image shows a screenshot of the ANDERS 'Enable two-factor' form. At the top is the ANDERS logo. Below it is the title 'Enable two-factor'. A dropdown menu labeled 'Select a method \*' has 'Email' selected. Below this is a text box with the instruction: 'To enable two-factor using email, click the button to send a one-time use code. Once you receive the code, enter it in the form below.' The email address 'Email: courtney.seeber@gmail.com' is displayed. A blue button labeled 'Send a one-time code' is below. A text input field labeled 'Verification code \*' contains the placeholder text 'Enter the one-time code'. At the bottom is a blue button labeled '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.



## Enable two-factor

Because this is the first time you have enabled two-factor, we have generated you 10 recovery codes. These codes will not be shown again, so record them right now and store them in a safe place. These codes can be used to complete a two-factor login if you lose your device, and they can be used to disable two-factor authentication as well.

Please store this in a safe location

2BY37-7YZ5P	2KPBK-D735Y	J28DN-QQ4JS
6V4KB-VWJ2C	V5648-S9J62	G5G3V-CR9K9
ZQBB3-D89SV	ZPSHQ-NX2SZ	TY3FQ-VBVNB
	7G6CJ-SSSB3	

Once you have recorded the codes, click Done to return to HubSync.

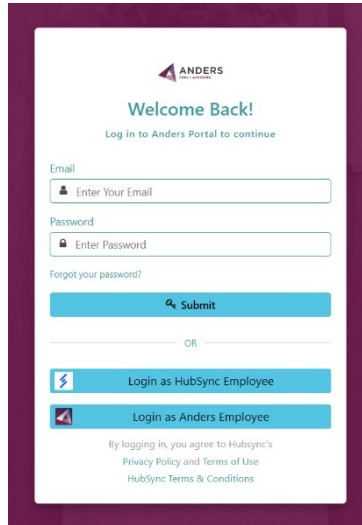
[→ Done](#)

## HOW TO LOG IN TO HUBSYNC

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

### Logging In

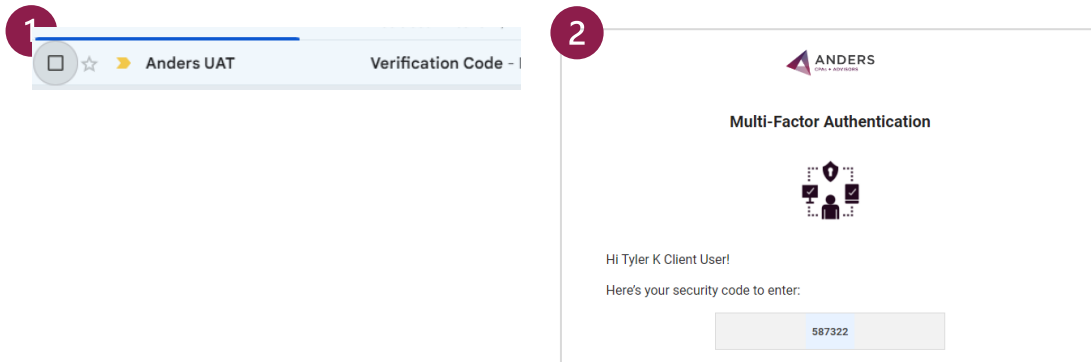
Access the HubSync platform by visiting the login site. Enter your credentials to log in.



The screenshot shows the login page for Anders HubSync. At the top, the Anders logo is displayed. Below it, the text reads "Welcome Back!" and "Log in to Anders Portal to continue". There are two input fields: "Email" with a placeholder "Enter Your Email" and "Password" with a placeholder "Enter Password". A "Forgot your password?" link is located below the password field. A blue "Submit" button is positioned below the input fields. Below the "Submit" button, there is an "OR" separator. Two additional login options are provided: "Login as HubSync Employee" and "Login as Anders Employee". At the bottom, there is a small disclaimer: "By logging in, you agree to HubSync's Privacy Policy and Terms of Use" and "HubSync Terms & Conditions".

### Verification Code Process

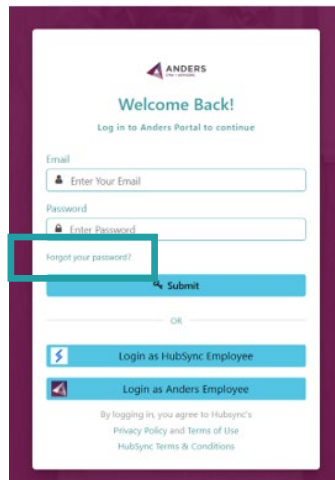
For added security, you may be required to enter a verification code that will be sent to your email. Follow the prompts to complete this process.



The screenshot illustrates the verification code process in two steps. Step 1 shows a browser tab titled "Anders UAT" with a "Verification Code" notification. Step 2 shows the "Multi-Factor Authentication" screen. The screen displays the Anders logo, the text "Multi-Factor Authentication", and a graphic of a person with a shield and checkmarks. Below this, it says "Hi Tyler K Client User!" and "Here's your security code to enter:". A text input field contains the security code "587322".

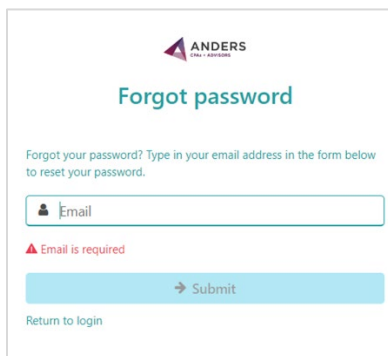
## Resetting Your Password

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



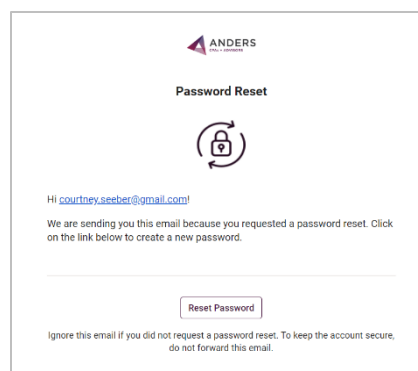
The screenshot shows the ANDERS login portal. At the top, it says "Welcome Back!" and "Log in to Anders Portal to continue". Below this are two input fields: "Email" with a placeholder "Enter Your Email" and "Password" with a placeholder "Enter Password". A red box highlights the "Forgot your password?" link located below the password field. Below the input fields is a blue "Submit" button. Further down, there are two options: "Login as HubSync Employee" and "Login as Anders Employee". At the bottom, there is a small disclaimer: "By logging in, you agree to HubSync's Privacy Policy and Terms of Use HubSync Terms & Conditions".

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



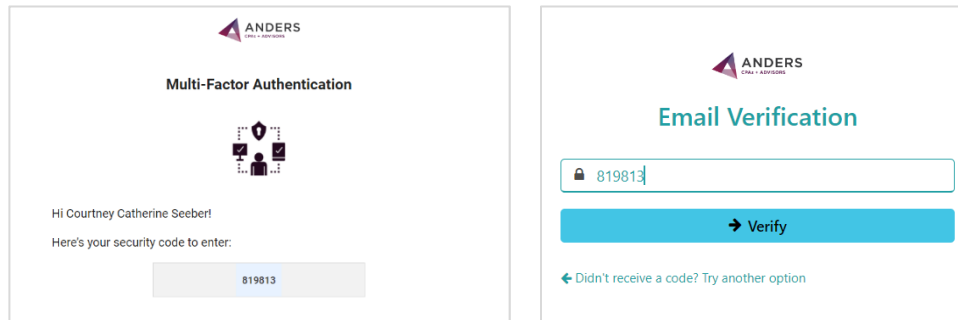
The screenshot shows the "Forgot password" page. At the top, it says "Forgot password" in large blue text. Below this, it says "Forgot your password? Type in your email address in the form below to reset your password." There is a single input field labeled "Email". Below the input field, there is a red error message: "▲ Email is required". At the bottom of the form is a blue "Submit" button. Below the button is a link that says "Return to login".

**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.

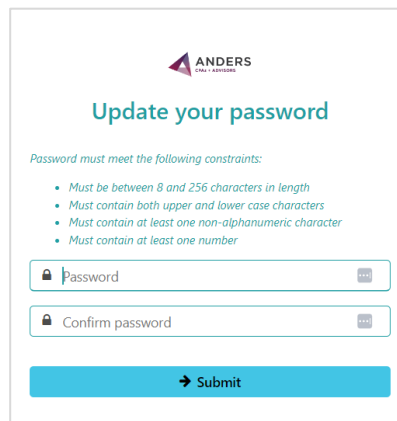


The screenshot shows an email titled "Password Reset". At the top, it says "ANDERS" and "Password Reset". Below this is a lock icon with a circular arrow around it. The email body says: "Hi courtney.seebet@gmail.com! We are sending you this email because you requested a password reset. Click on the link below to create a new password." Below this text is a button labeled "Reset Password". At the bottom of the email, there is a disclaimer: "Ignore this email if you did not request a password reset. To keep the account secure, do not forward this email."

**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.





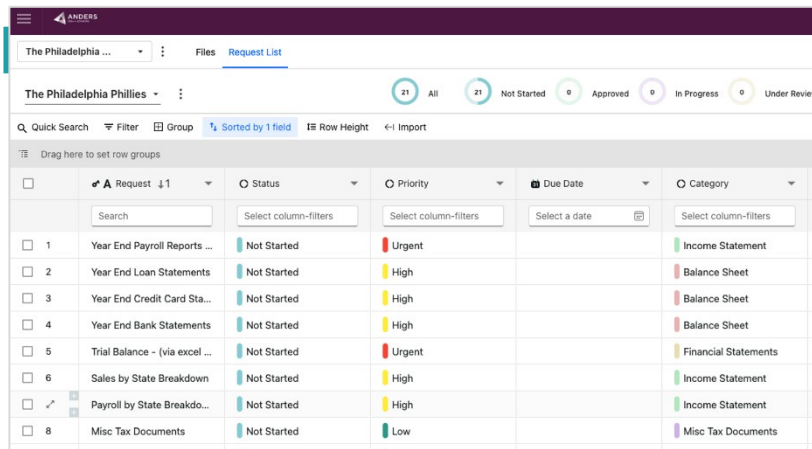
## MANAGING YOUR WORKSPACE

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

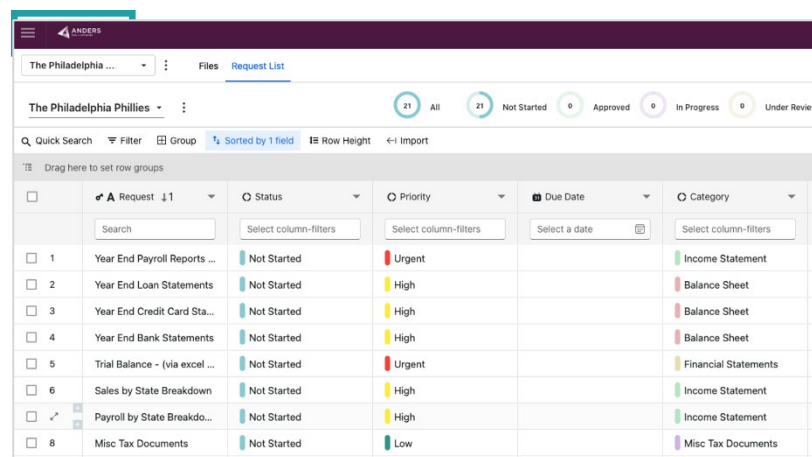
From inside a request list, you can easily access other workspaces that you have access to, by clicking on the drop-down arrow in the top left side of the screen.



Request	Status	Priority	Due Date	Category
1 Year End Payroll Reports ...	Not Started	Urgent		Income Statement
2 Year End Loan Statements	Not Started	High		Balance Sheet
3 Year End Credit Card Sta...	Not Started	High		Balance Sheet
4 Year End Bank Statements	Not Started	High		Balance Sheet
5 Trial Balance - (via excel ...	Not Started	Urgent		Financial Statements
6 Sales by State Breakdown	Not Started	High		Income Statement
7 Payroll by State Breakdo...	Not Started	High		Income Statement
8 Misc Tax Documents	Not Started	Low		Misc Tax Documents

## Navigate Back to the Homepage

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

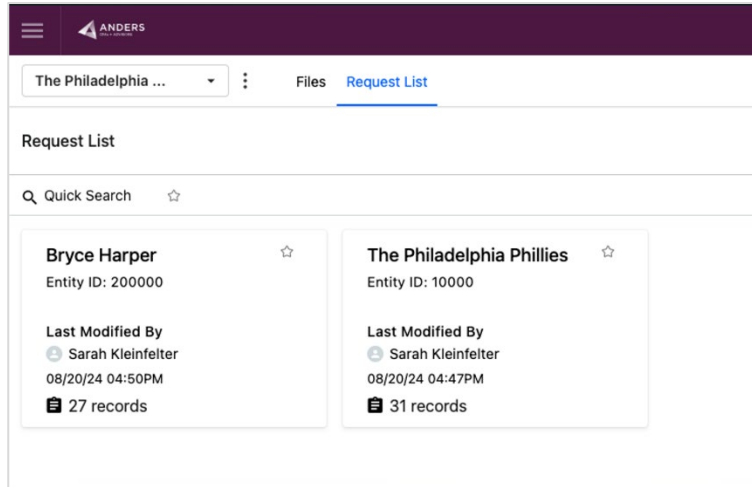


Request	Status	Priority	Due Date	Category
1 Year End Payroll Reports ...	Not Started	Urgent		Income Statement
2 Year End Loan Statements	Not Started	High		Balance Sheet
3 Year End Credit Card Sta...	Not Started	High		Balance Sheet
4 Year End Bank Statements	Not Started	High		Balance Sheet
5 Trial Balance - (via excel ...	Not Started	Urgent		Financial Statements
6 Sales by State Breakdown	Not Started	High		Income Statement
7 Payroll by State Breakdo...	Not Started	High		Income Statement
8 Misc Tax Documents	Not Started	Low		Misc Tax Documents

## WORKING WITHIN THE REQUEST LIST

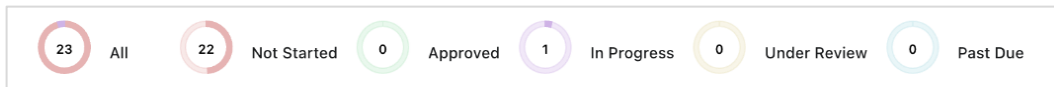
From the Request List area, view and manage individual requests or tasks, including:

- **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.



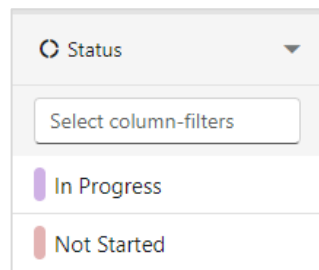
### KEY TIP

- **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.

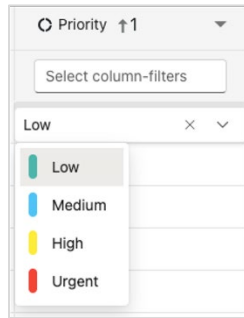


- **Status:** From the Status column, view the current status of each request (e.g., not started, in progress, completed).

**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.



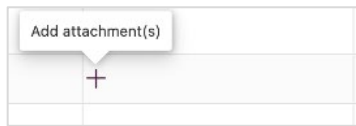
- **Priority:** Review the document priority levels assigned by your Anders team to help you manage document uploads and keep your projects moving forward.



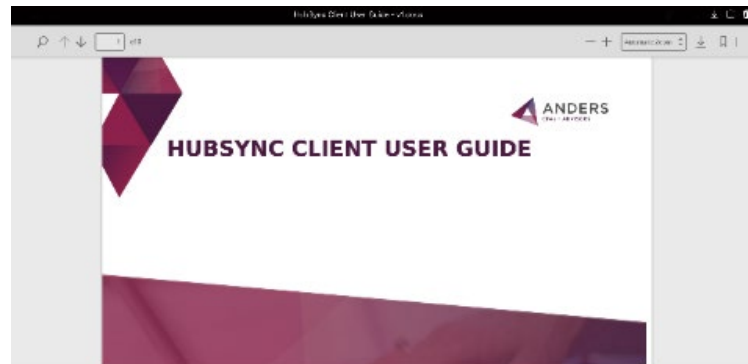
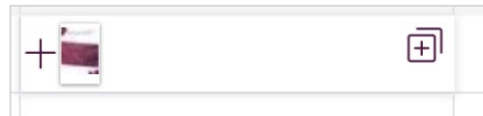
- **Due Date:** Review due dates to keep track of deadlines.

**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.

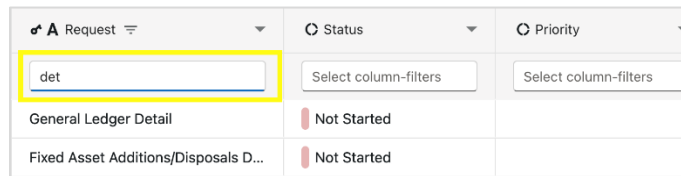


To preview the uploaded document from the grid, *click* on the desired document and a preview will show in the UI:

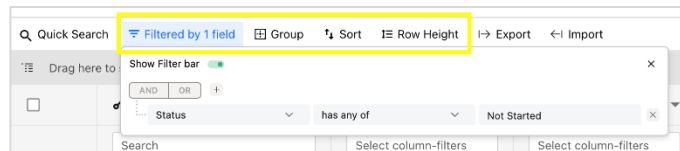


- **Assigned To:** Assign requests to specific team members.  
*NOTE:* You can only assign Requests for those that have access to the workspace.

- **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 ...

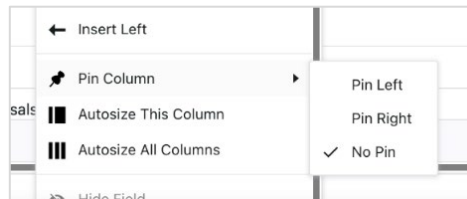


-OR- use the in-line grid filters to manipulate and view your data easily.



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

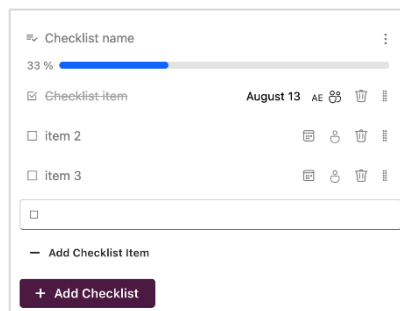
- **Pinning Columns:** Using the carrot drop-down on the column header you can pin columns left or right.



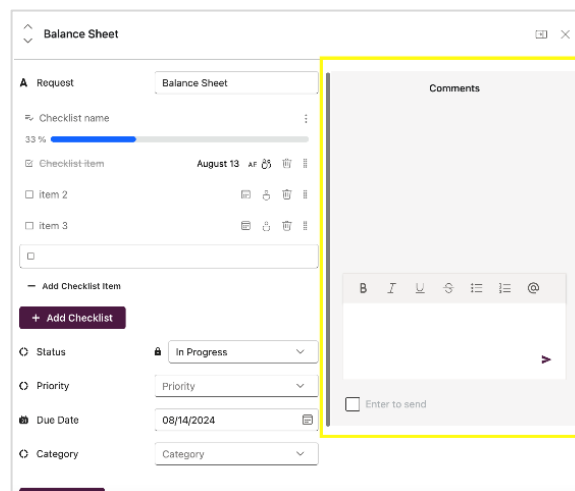
- **Checklists:** Each row or record can have its own checklist. To add a checklist, expand the record and then click the “+ Add Checklist button to create your own custom checklist.



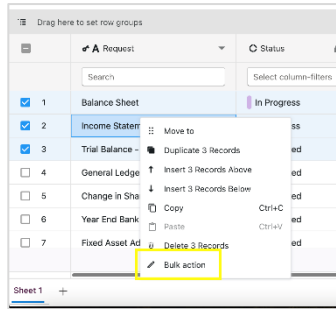
**NOTE:** Users can add multiple checklists on each record. Each checklist can have a due date and assigned person. When a checklist item is marked off or completed, the progress bar is updated and item is struck through.



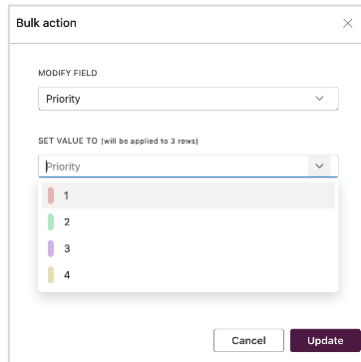
- **Messages/Comments on a Request Item:** Communicate about specific requests directly within the item. To message and comment at the record level, expand the record. On the right-hand side, enter comments/messages in the open text box. Option to tag people with notifications.



- **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*”.

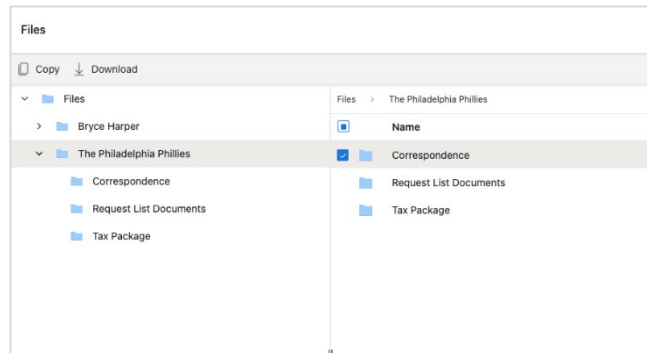


Next, select the column to perform the bulk action on, and the value that records should be updated to.



## WORKING WITHIN THE FILE AREA

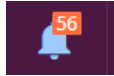
From the File Area, view files associated with a project. Download files directly to the workspace, as needed. To upload files, either Drag and Drop files into a folder or click the “upload” button.



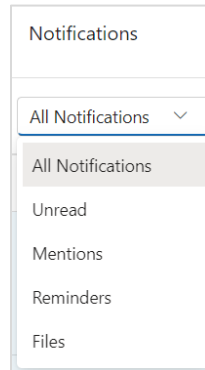
## NOTIFICATIONS

### Viewing Notifications

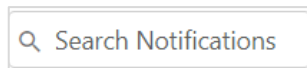
From the dashboard, you can see if there are notifications on any of your items or tasks if there is a red number on the top of the “bell” icon on the top-right corner of the screen.



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.



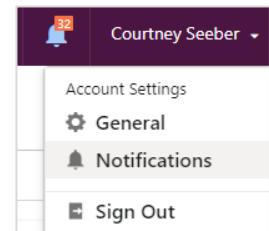
### Email Notifications Preferences

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**.

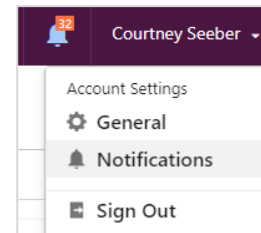


Customize which types of notifications you receive based on categories (Messages, Databases, Tax Organizer).

	Instantly	Daily	Never
<b>Messages</b>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
User mentions you in a message	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Databases</b>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Receive notifications on a database record with a reminder	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Receive notifications on a database record checklist item with a reminder	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Receive notifications when you are added to record	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Receive notifications when you are added to a record checklist	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Tax Organizer</b>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
User adds a comment to the Tax Organizer	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

## 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.

Field	Value
First Name	Tyler K
Middle Name	
Last Name	Client User
Email	tylerkaberline@gmail.com
Change Email	[Change Email]
Password	[Change Password]
Delete Account	[Delete Account]
Reset MFA	[Reset MFA]