



# HUBSYNC CLIENT

---

USER GUIDE

HubSync is Pinion's 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.

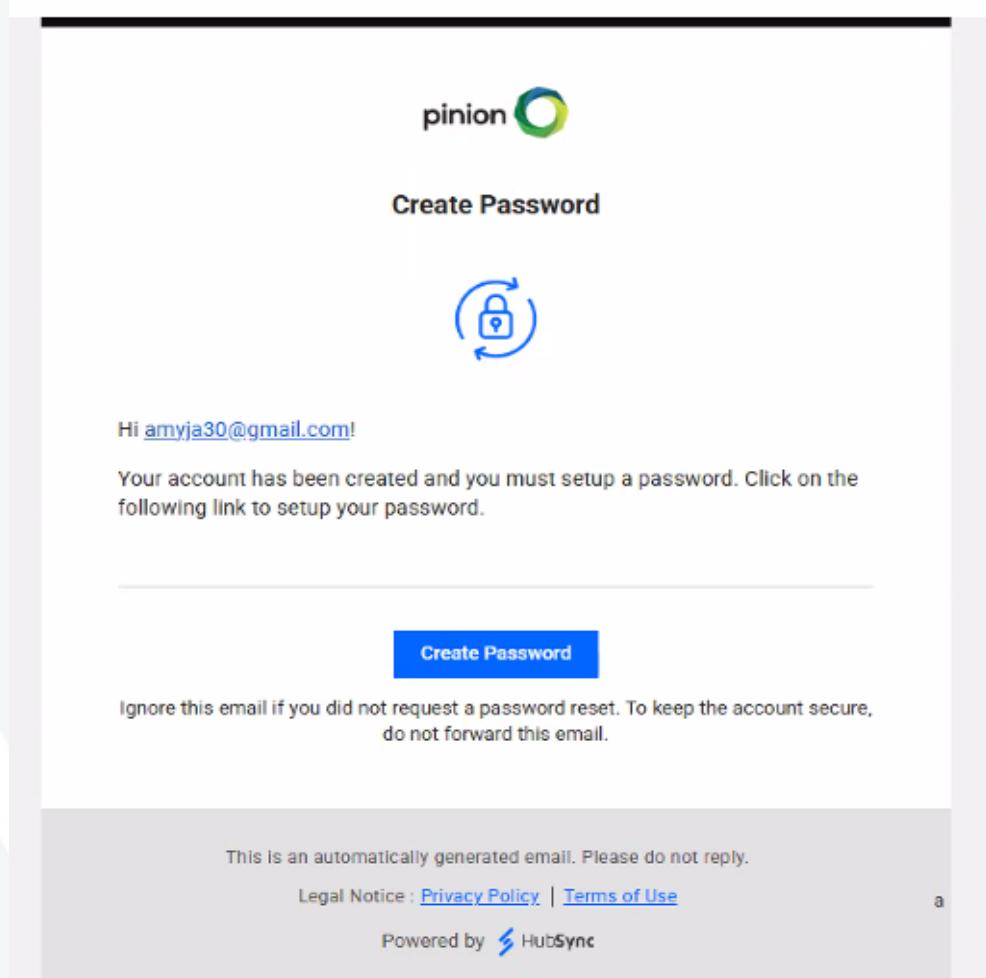
To navigate to a specific section of this guide, simply click on that section or topic title, from the Table of Contents.

## TABLE OF CONTENTS

<a href="#">HOW TO SIGN UP</a>	2
<a href="#">HOW TO LOG IN TO HUBSYNC</a>	6
<a href="#">SETTING UP HOMEPAGE VIEWS</a>	8
<a href="#">MANAGING YOUR WORKSPACE</a>	9
<a href="#">WORKSPACE</a>	10
<a href="#">Navigating Your Workspace</a>	10
<a href="#">Dashboard</a>	10
<a href="#">Organizer Information</a>	11
<a href="#">Uploading Documents</a>	12
<a href="#">Filling Out the Organizer</a>	13
<a href="#">After Completing Organizer</a>	14
<a href="#">WORKING WITHIN THE FILE CABINET</a>	15
<a href="#">NOTIFICATIONS</a>	16
<a href="#">MANAGE YOUR USER SETTINGS</a>	18
<a href="#">CONTACT US</a>	18

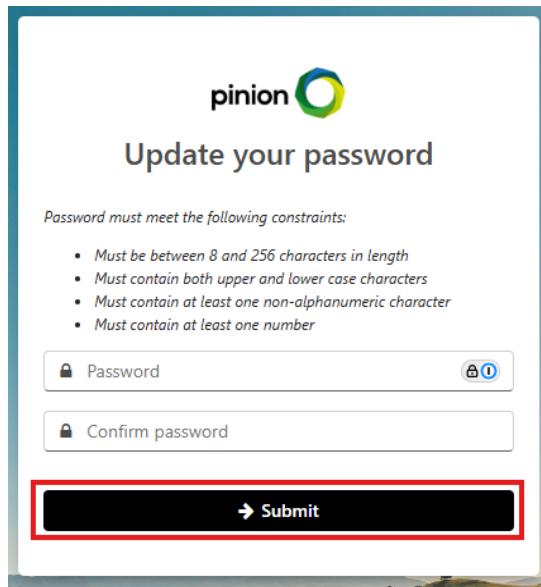
## How to Sign Up

**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.



pinion

Update your password

Password must meet the following constraints:

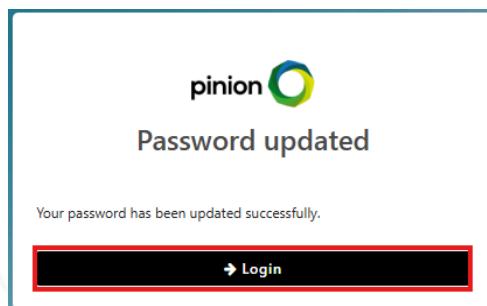
- Must be between 8 and 256 characters in length
- Must contain both upper and lower case characters
- Must contain at least one non-alphanumeric character
- Must contain at least one number

>Password

Confirm password

Submit

**Step 3: Complete Registration** - Confirmation of password update will be displayed on the next screen with a request to log in. Click on “**Login**”.



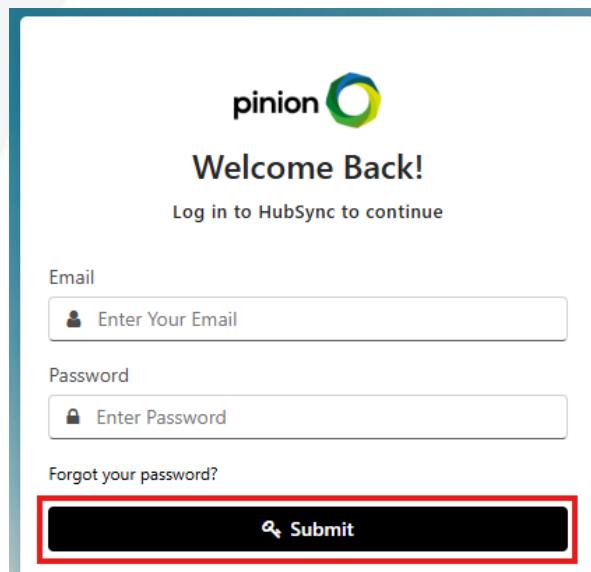
pinion

Password updated

Your password has been updated successfully.

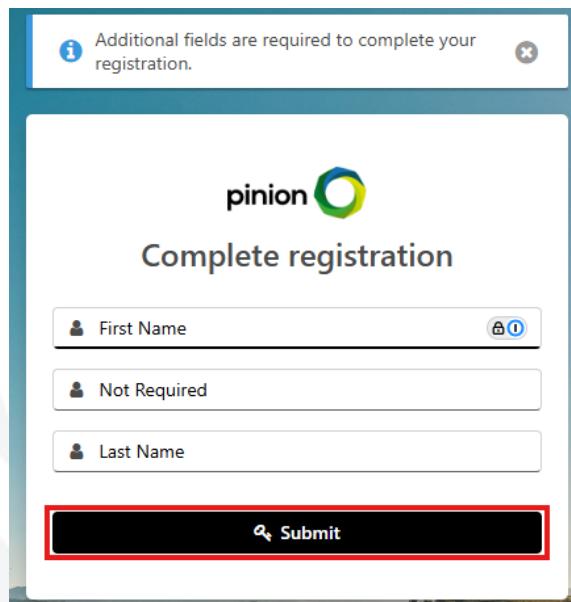
Login

**Step 4: Sign In** – Use your email address and password to log in and click “Submit”.



The image shows the Pinion login interface. At the top is the Pinion logo, followed by the text "Welcome Back!". Below that is the instruction "Log in to HubSync to continue". There are two input fields: "Email" and "Password", each with a placeholder and a small icon. Below the fields is a link "Forgot your password?". At the bottom is a large black "Submit" button with a white icon and the word "Submit". A red rectangular box highlights the "Submit" button.

**Step 5: Complete Registration** - Fill out the First Name and Last Name fields and click “Submit”.



The image shows the Pinion registration interface. At the top, a message box says "Additional fields are required to complete your registration." Below the message is the Pinion logo and the text "Complete registration". There are three input fields: "First Name" (with a blue "i" icon and a "Required" status), "Not Required" (with a blue "i" icon and a "Not Required" status), and "Last Name". At the bottom is a large black "Submit" button with a white icon and the word "Submit". A red rectangular box highlights the "Submit" button.

## Step 6: 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”.

You must configure two-factor in order to continue.

**pinion**

### Enable two-factor

Select a method \*

SMS

To enable two-factor using SMS, enter a mobile phone and click the button to send a one-time use code. Once you receive the code, enter it in the form below.

Country Code \*

+1 United States

Mobile phone \*

Send a one-time code

Verification code \*

Enter the one-time code

**pinion**

### 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

KLW3B-BGMBK	J2PNG-VMM55	8D5VC-49Q5L
7SFPR-ZHVQR	B7X3N-YGDTJ	Y63RJ-KJ657
5Y4NK-6T63Y	VFMQT-QRMJ8	CCN4J-R3VMX
6J9QV-JQ9GL		

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

**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, read the Acceptable Use Terms and Policy and click “Accept” to access your client portal.

Acceptable Use Terms and Policy 1 Jan, 2025

As a precondition to accessing this online offering and the resulting tax services (collectively, “Services”) provided by HubSync US, LLP or any of its subsidiaries (collectively, “HubSync”) and in utilizing any requested password and username, you agree to abide by the following terms and conditions (“Terms”):

1. In the course of using the Services, you may submit content to HubSync (including your personal data and the personal data of others (all of the above will be referred to as your “Content”). You grant HubSync a worldwide, royalty free license to use, reproduce, distribute, modify, host, adapt, create derivative works and otherwise exploit your Content but only for the limited purposes of providing the Services to you and as otherwise permitted by the HubSync privacy policies. This license for such limited purposes continues even after you stop using our Services, with respect to aggregate and de-identified data derived from your Content and any residual backup copies of your Content made in the ordinary course of HubSync’s business. The license also extends to any trusted third parties we work with to the extent necessary to provide the Services to you. If you provide HubSync with feedback about the Services, we may use your feedback without any obligation to you. When uploading Content to the tax portal, make sure you have the necessary rights to grant us this license and for using the Uploaded Data with HubSync’s services, prior to uploading it. You hereby release HubSync US, LLP and its affiliated companies from any and all liability under applicable data protection laws to the extent you do upload such personal data in contravention of this instruction. By uploading data to the tax portal, you acknowledge that you understand, accept, and agree to be bound by these Uploaded Data requirements.

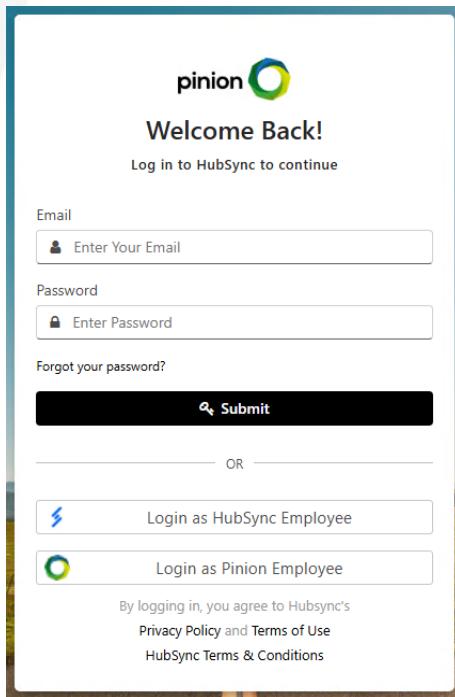
2. Neither these Terms, nor your use of the Services, grants you ownership of the Services or the content you access through the Services (other than your Content). These Terms do not grant you

## How to Log in to HubSync

Login Site – <http://pinionglobal.hubsync.com>

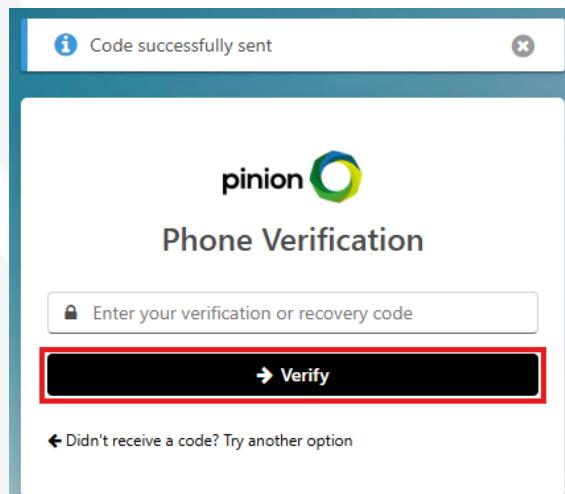
### Logging In

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



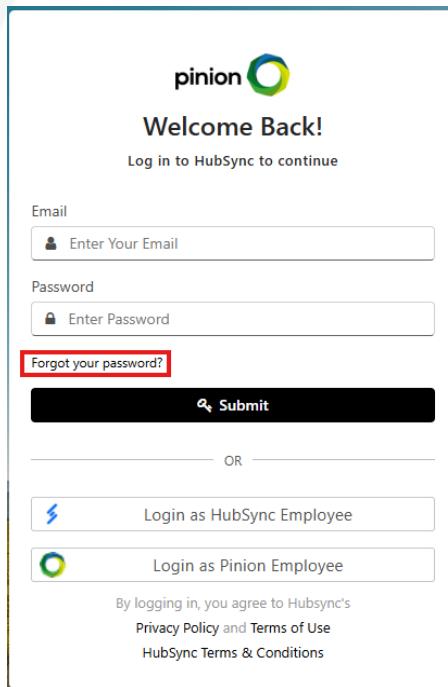
### Verification Code Process

For added security, you may be required to enter a verification code that will be sent to the method you selected when signing up for your account. Follow the prompts to complete this process.



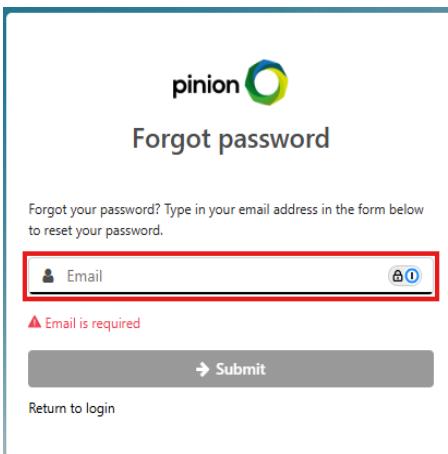
## Resetting Your Password

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



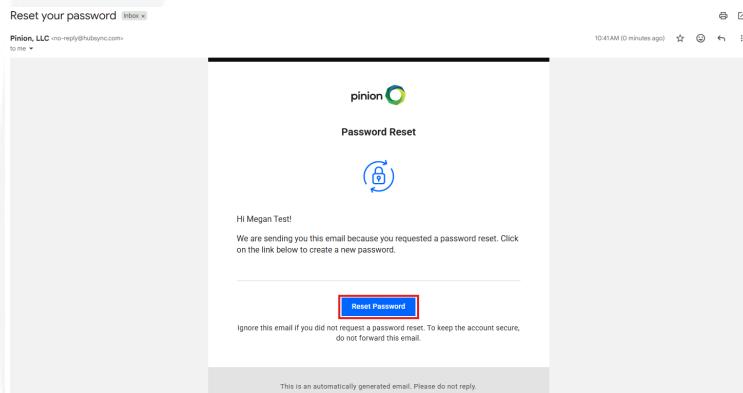
The image shows the Pinion HubSync login screen. At the top is the Pinion logo. Below it, the text "Welcome Back!" and "Log in to HubSync to continue". There are two input fields: "Email" and "Password". Below these is a link "Forgot your password?". A large red box highlights this link. Below the link is a "Submit" button with a right-pointing arrow. A horizontal line with the text "OR" is followed by two login options: "Login as HubSync Employee" and "Login as Pinion Employee". At the bottom, there is a note: "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.

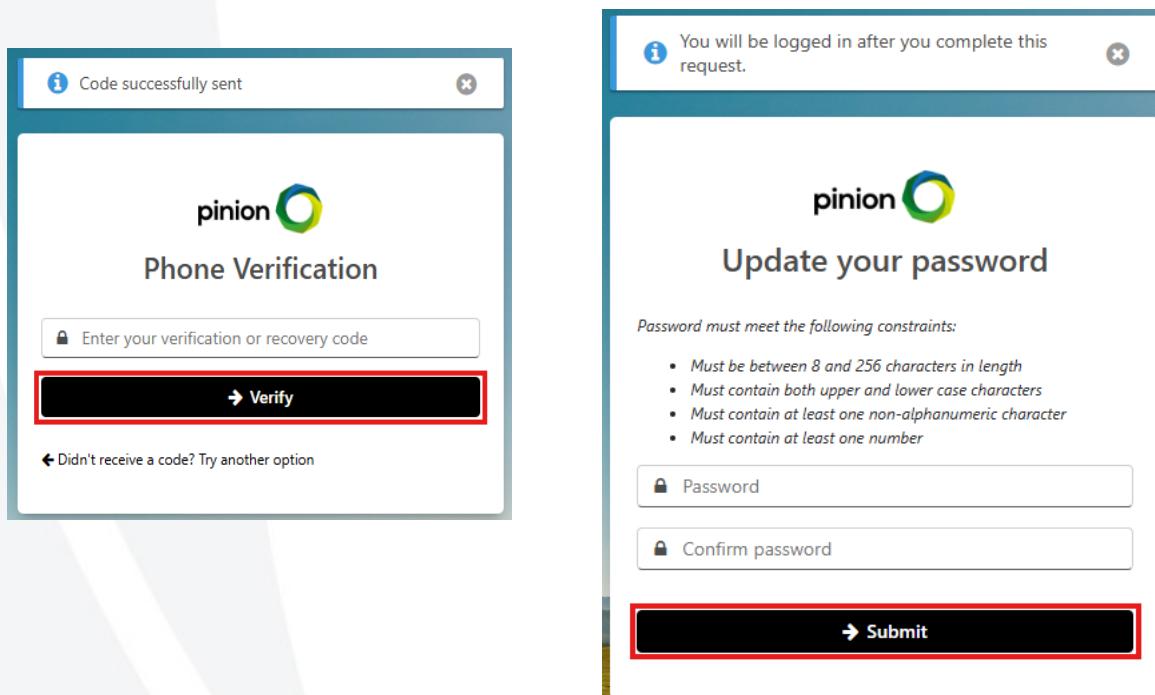


The image shows the "Forgot password" screen. At the top is the Pinion logo. Below it, the text "Forgot password". A note says: "Forgot your password? Type in your email address in the form below to reset your password." Below this is an "Email" input field with a user icon. A red box highlights this field. A red error message "▲ Email is required" is displayed below the field. A "Submit" button with a right-pointing arrow is below the input field. At the bottom, there is a link "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.



**Step 4:** 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.

A screenshot of the "Workspaces" section in the HubSync client. At the top, there is a header with "Workspaces" and a "+ New Workspace" button. Below the header is a search bar with "Search", "Group", and "Export" options. A note says "Drag here to set row groups". To the right of the search bar is a "Grid View" icon, which is highlighted with a red box. Below the search bar is a table with columns: "Name", "Client ID", "Office", "Partner", "Workspace Type", and "Created By". Each column has a search input field. The table header also includes "Name", "Client ID", "Office", "Partner", "Workspace Type", and "Created By".

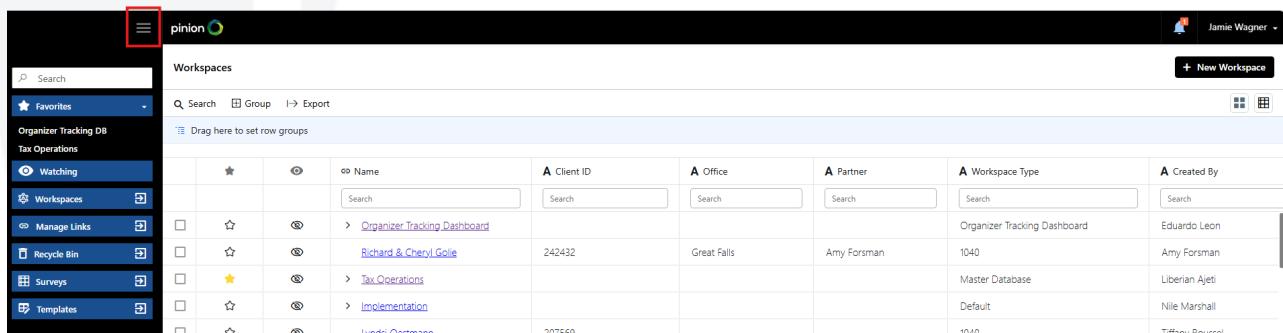
## Managing Your Workspace

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

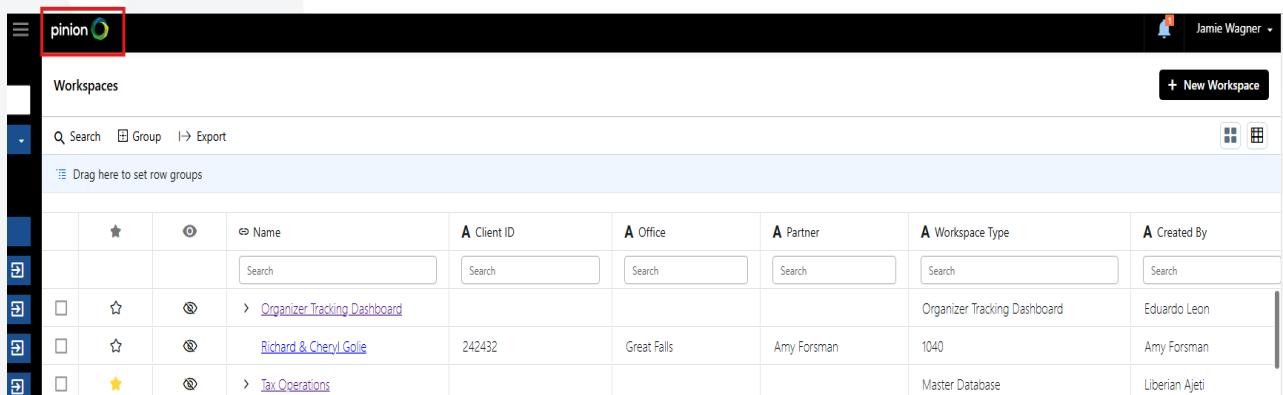
From inside a request list, you can easily access other workspaces that you have access to, by clicking on the drop-down arrow in the top left side of the screen.



Name	Client ID	Office	Partner	Workspace Type	Created By
Organizer Tracking Dashboard	242432	Great Falls	Amy Forsman	1040	Eduardo Leon
Richard & Cheryl Gole	242432	Great Falls	Amy Forsman	Master Database	Liberian Ajeti
Tax Operations	242432	Great Falls	Amy Forsman	Default	Nile Marshall
Implementation	242432	Great Falls	Amy Forsman	Default	Tiffani Deveral
Linda Forsman	242432	Great Falls	Amy Forsman	Default	Tiffani Deveral

## Navigate Back to the Homepage

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

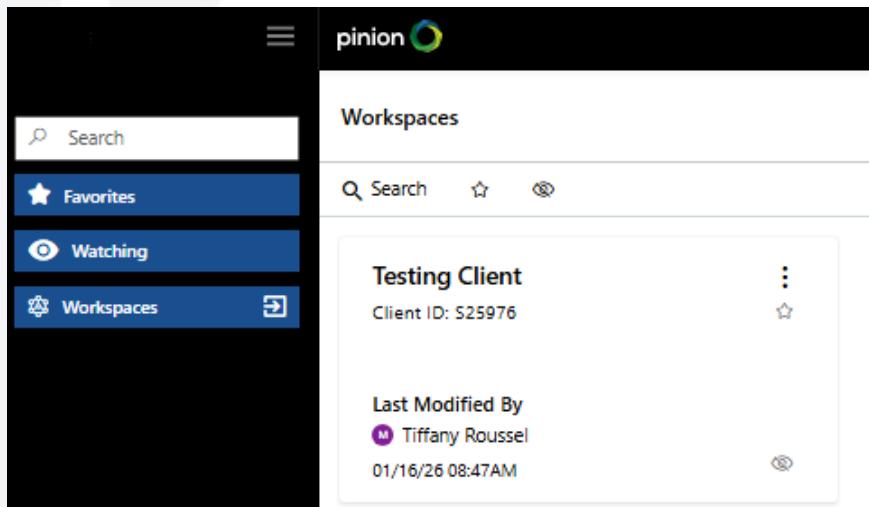


Name	Client ID	Office	Partner	Workspace Type	Created By
Organizer Tracking Dashboard	242432	Great Falls	Amy Forsman	1040	Eduardo Leon
Richard & Cheryl Gole	242432	Great Falls	Amy Forsman	Master Database	Liberian Ajeti
Tax Operations	242432	Great Falls	Amy Forsman	Default	Nile Marshall

## Workspace

### Navigating your Workspace

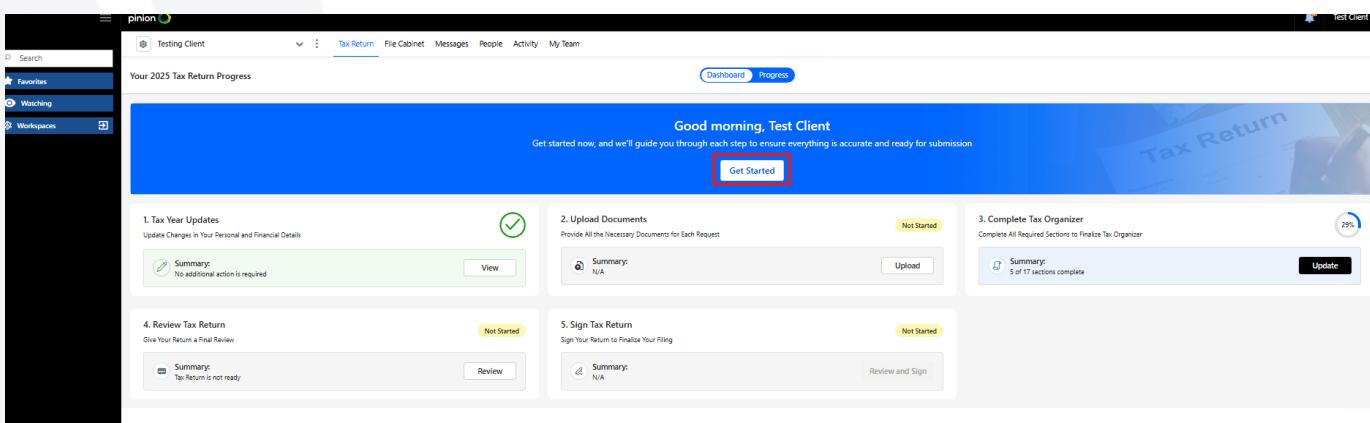
Your workspace will be displayed as the one shown below if in Tile Mode:



Please note that if your email address is associated with multiple client relationships with Pinion and you get invited to all of those with the same email address, you will see all of your workspaces in one place.

## Dashboard

When you click into your workspace, you will have a landing page referred to as your Dashboard.



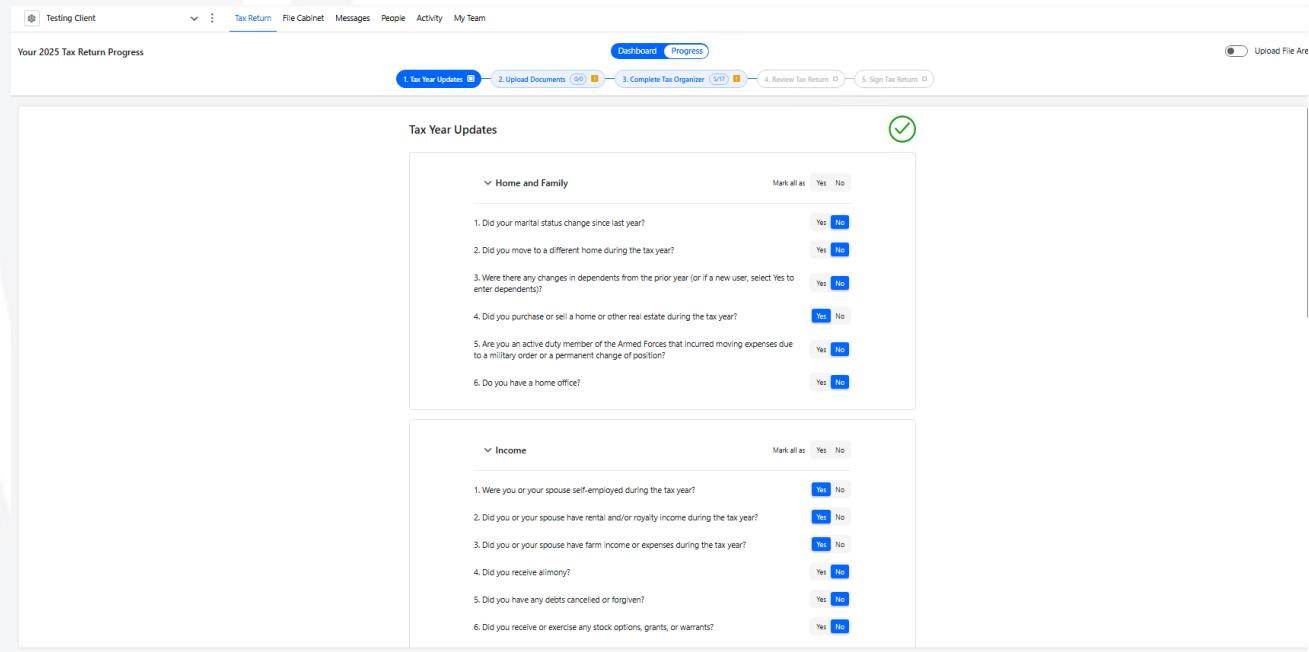
Click on “**Get Started**” to begin filling out your Organizer.

## Organizer Information

After clicking on “**Get Started**” it will open up to your Organizer.

You can see the Dashboard Progress at the top of your screen and you will begin by answering the questions.

All questions must be answered before moving on.



**Tax Year Updates**

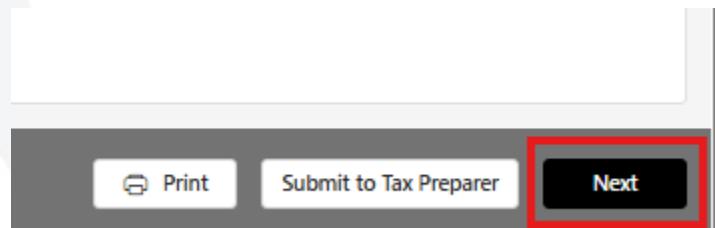
**Home and Family**

- Did your marital status change since last year?  Yes  No
- Did you move to a different home during the tax year?  Yes  No
- Were there any changes in dependents from the prior year (or if a new user, select Yes to enter dependents)?  Yes  No
- Did you purchase or sell a home or other real estate during the tax year?  Yes  No
- Are you an active duty member of the Armed Forces that incurred moving expenses due to a military order or a permanent change of position?  Yes  No
- Do you have a home office?  Yes  No

**Income**

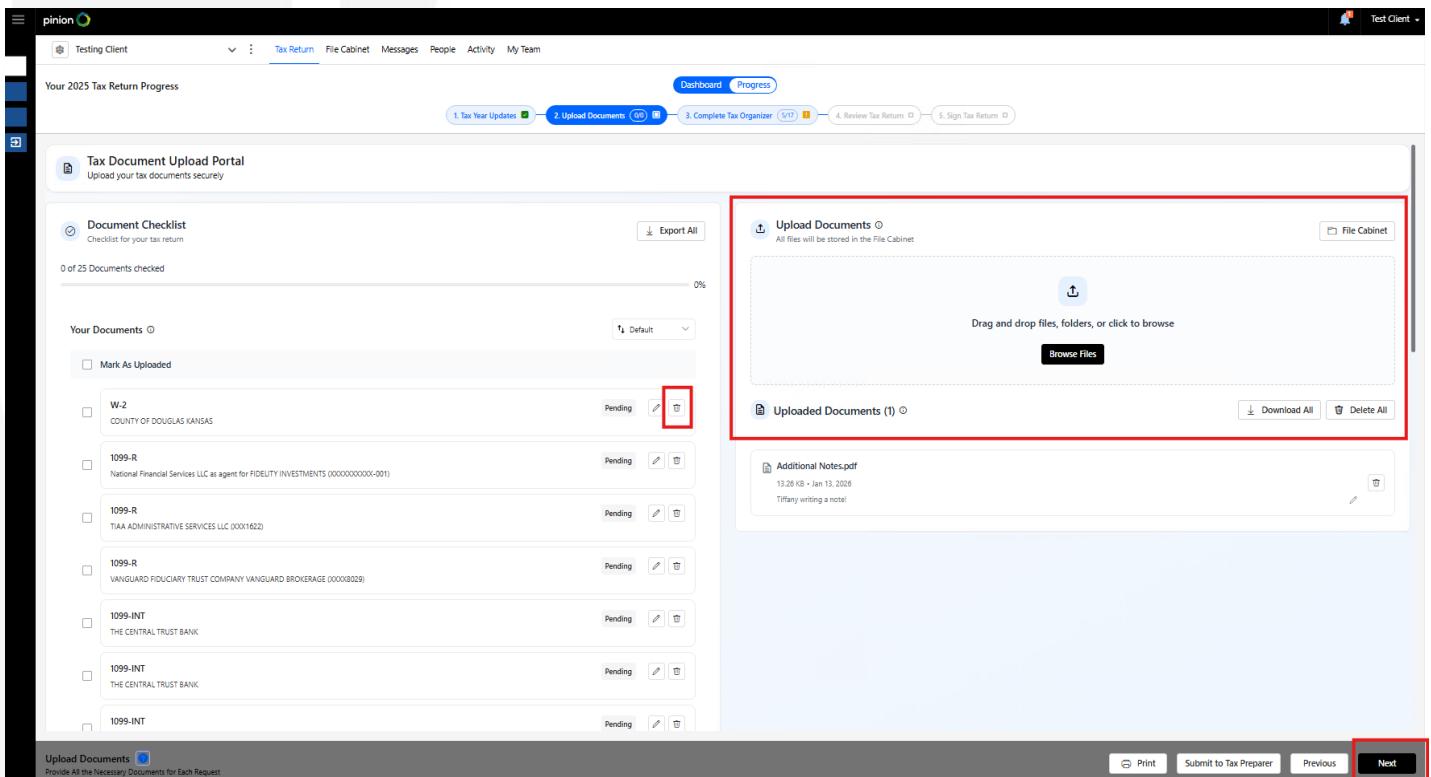
- Were you or your spouse self-employed during the tax year?  Yes  No
- Did you or your spouse have rental and/or royalty income during the tax year?  Yes  No
- Did you or your spouse have farm income or expenses during the tax year?  Yes  No
- Did you receive alimony?  Yes  No
- Did you have any debts cancelled or forgiven?  Yes  No
- Did you receive or exercise any stock options, grants, or warrants?  Yes  No

Once the questions are answered, you can use the “**Next**” button in the bottom right hand corner of the screen.



## Uploading Documents

You are now in the Uploading Documents section. You will see your prior year information on the left hand side; you can use the trash can icon to mark that document type as not applicable for the current year. There is an upload box on the right hand side where you can upload from your device or drag and drop your documents.



The screenshot shows the pinion Tax Document Upload Portal. At the top, there's a navigation bar with 'Testing Client', 'Tax Return', 'File Cabinet', 'Messages', 'People', 'Activity', 'My Team', 'Dashboard', and 'Progress'. Below this is a progress bar for 'Your 2025 Tax Return Progress' with five steps: 1. Tax Year Updates (2), 2. Upload Documents (100%), 3. Complete Tax Organizer (5/17), 4. Review Tax Return (0), and 5. Sign Tax Return (0). The main area is titled 'Tax Document Upload Portal' and 'Upload your tax documents securely'. It features a 'Document Checklist' section with a 'Mark As Uploaded' checkbox and a list of documents: W-2 (COUNTY OF DOUGLAS KANSAS), 1099-R (National Financial Services LLC as agent for FIDELITY INVESTMENTS (000000000-001)), 1099-R (TIAA ADMINISTRATIVE SERVICES LLC (00X162)), 1099-R (VANGUARD FIDUCIARY TRUST COMPANY VANGUARD BROKERAGE (0000803)), 1099-INT (THE CENTRAL TRUST BANK), 1099-INT (THE CENTRAL TRUST BANK), and 1099-INT. Each document has a 'Pending' status and edit/delete icons. To the right, there's an 'Upload Documents' section with a 'Browse Files' button and a list of uploaded documents: 'Additional Notes.pdf' (13.26 KB, Jan 13, 2026, Tiffany writing a note!). At the bottom, there are buttons for 'Print', 'Submit to Tax Preparer', 'Previous', and a large 'Next' button, which is highlighted with a red box.

When you have finished uploading documents, you can use the “**Next**” button in the bottom right hand corner to navigate to the next section of the organizer.

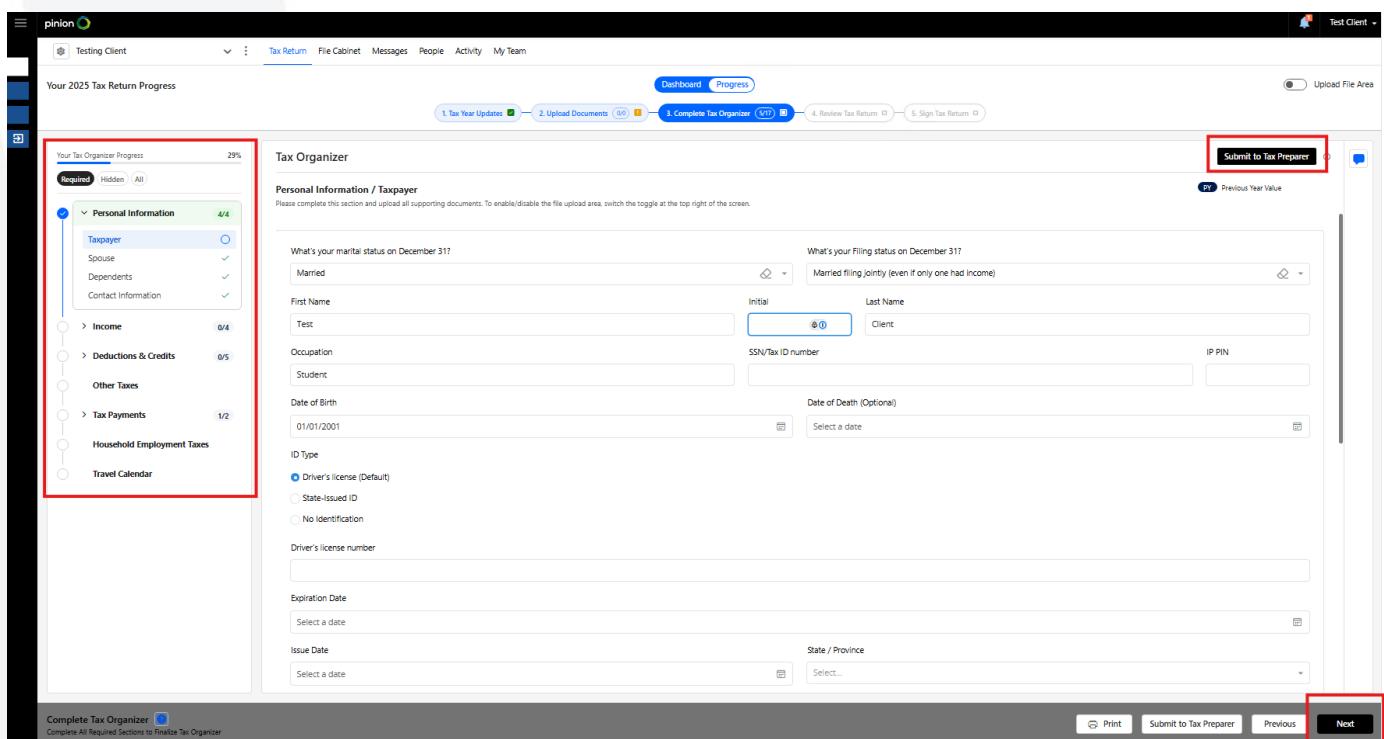
## Filling Out the Organizer

In this section, you will verify your information that is relevant to your personal tax situation. As you complete each section, a green checkmark will appear on the left hand navigation pane. You can click in each section or use the bottom right hand next button to move forward in your Organizer.

The Travel Calendar is not required and note that the first set of the question will determine which sections that you see on the left hand navigation pane.

Once completed click the “**Submit to Tax Preparer**” button in the upper right hand corner to notify your tax professional that you have finished uploading your documents.

Then click “**Next**”.



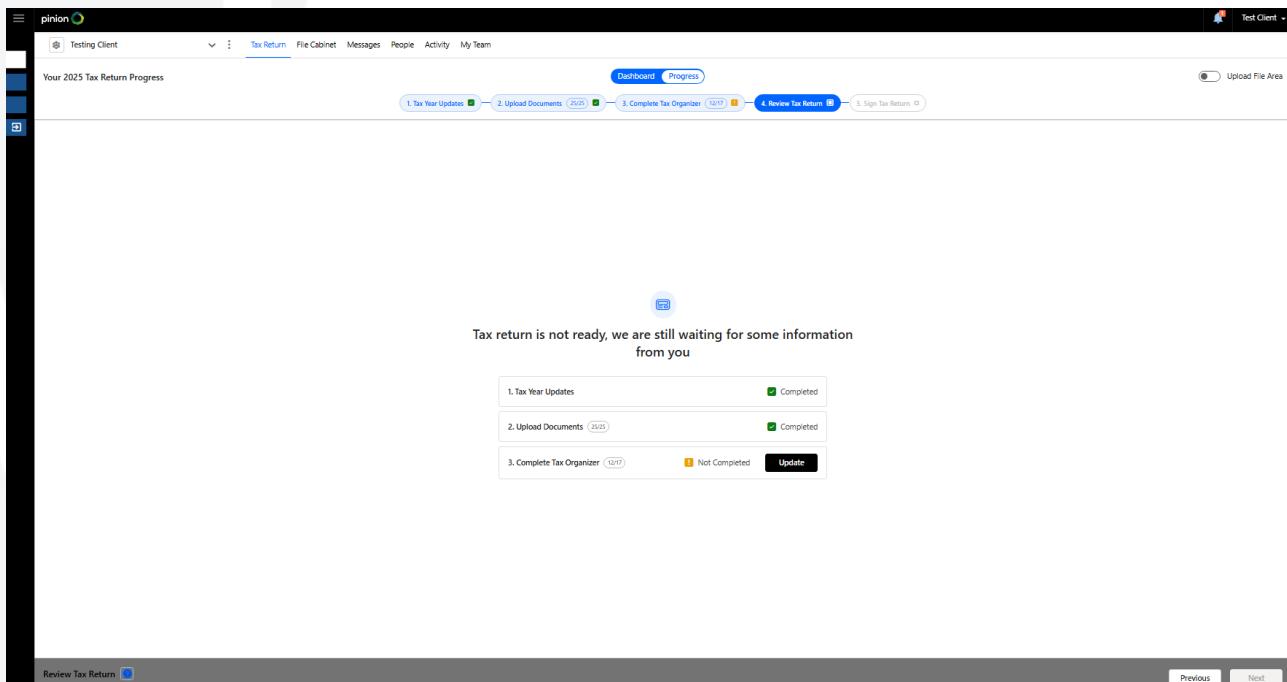
The screenshot shows the pinion Tax Organizer interface. The top navigation bar includes 'Testing Client', 'Tax Return', 'File Cabinet', 'Messages', 'People', 'Activity', 'My Team', 'Dashboard', 'Progress', 'Upload File Area', and a 'Previous Year Value' button. The main area is titled 'Your 2025 Tax Return Progress' and shows '29%' completion. A progress bar indicates '1. Tax Year Updates' (2/2), '2. Upload Documents' (4/5), '3. Complete Tax Organizer' (4/4), '4. Review Tax Return' (0/1), and '5. Sign Tax Return' (0/1). The 'Complete Tax Organizer' section is highlighted with a red box. The 'Tax Organizer' section contains 'Personal Information / Taxpayer' fields: 'What's your marital status on December 31?' (Married), 'First Name' (Test), 'Last Name' (Client), 'Occupation' (Student), 'SSN/Tax ID number' (IP PIN), 'Date of Birth' (01/01/2001), 'Date of Death (Optional)' (Select a date), 'ID Type' (Driver's license (Default)), 'Driver's license number' (input field), 'Expiration Date' (Select a date), 'Issue Date' (Select a date), and 'State / Province' (Select...). The bottom navigation bar includes 'Print', 'Submit to Tax Preparer', 'Previous', and a 'Next' button, which is also highlighted with a red box.

## After Completing Organizer

Once you have submitted your information to your tax professional and clicked through all sections of the Organizer, you will be notified that your tax return is not ready.

\*\*If you have additional documents to upload you will go to the Upload Section and click on the **“Submit to Tax Preparer”** button.

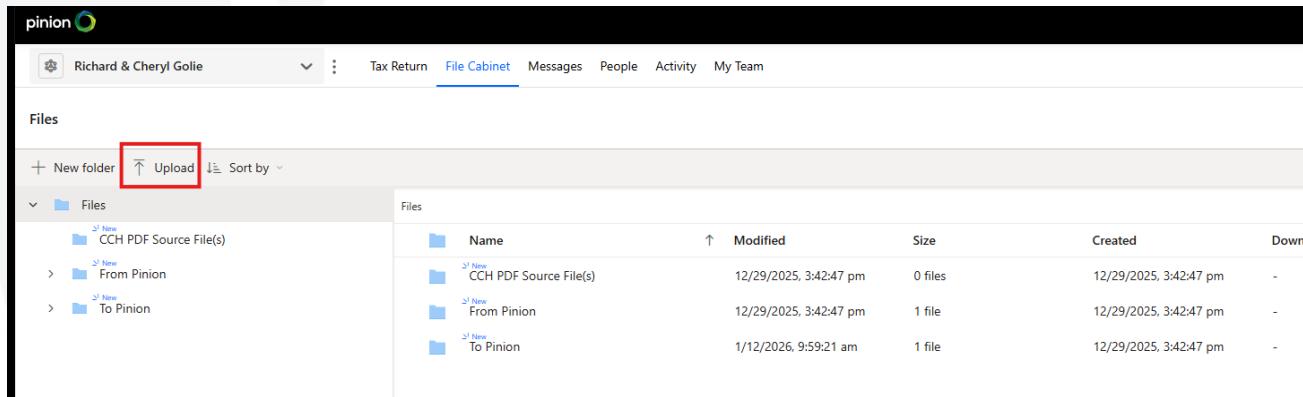
For this tax season we will not be using HubSync to deliver your tax return, if you receive your return electronically, we will continue to use SafeSend through this season.



## Working Within the File Cabinet

From the File Cabinet, 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.

The files that you have uploaded to your tax preparer are located in the CCH PDF Source Files folder if you need for reference.



The screenshot shows the pinion File Cabinet interface. At the top, there is a navigation bar with the pinion logo, user name 'Richard & Cheryl Golie', and project name 'Tax Return'. The 'File Cabinet' tab is selected. Below the navigation bar, there is a 'Files' section with a 'New folder' button and an 'Upload' button (which is highlighted with a red box). To the right, there is a table showing a list of files. The table has columns for Name, Modified, Size, Created, and Download. The data in the table is as follows:

Name	Modified	Size	Created	Download
CCH PDF Source File(s)	12/29/2025, 3:42:47 pm	0 files	12/29/2025, 3:42:47 pm	-
From Pinion	12/29/2025, 3:42:47 pm	1 file	12/29/2025, 3:42:47 pm	-
To Pinion	1/12/2026, 9:59:21 am	1 file	12/29/2025, 3:42:47 pm	-

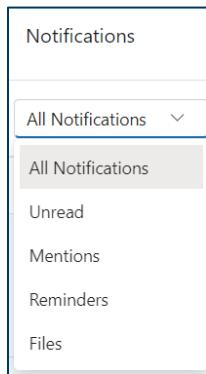
## Notifications

### Viewing Notifications

From the dashboard, you can see new 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.

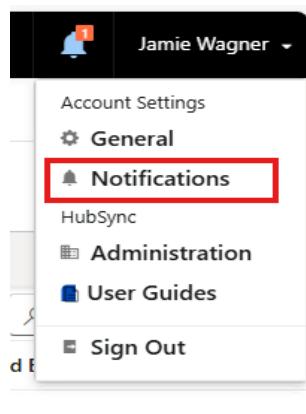


### Email Notifications Preferences

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.



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

Account Settings



Jamie Wagner

-  General
-  My Profile
-  Notifications

Email notification preferences

Instantly Daily Never

Messages

User mentions you in a message

Databases

Receive notifications on a database record with a reminder

Receive notifications on a database record checklist item with a reminder

Receive notifications when you are added to record

Receive notifications when you are added to a record checklist

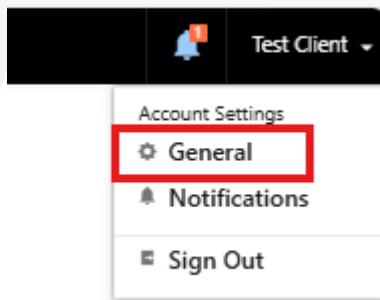
Tax Organizer

User adds a comment to the Tax Organizer

Once you've selected your preferred notification settings, click "**Save Changes**".

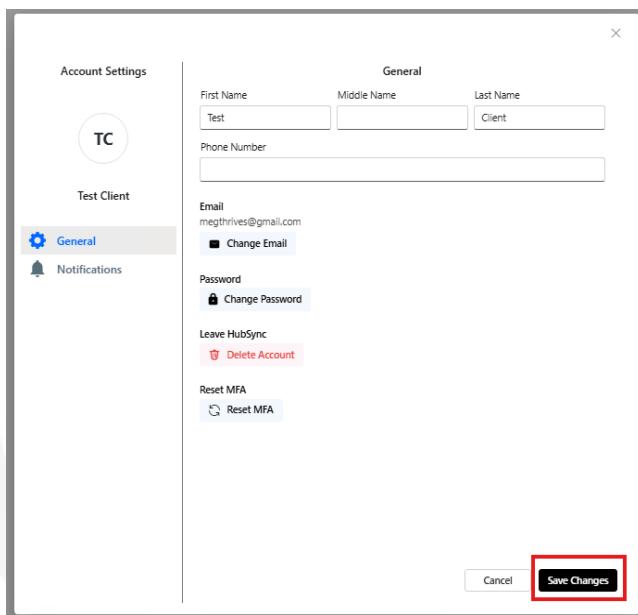
## Manage Your User Settings

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.



## Contact Us

For additional questions or support, please contact us at (316) 691-3703 or email us at [ClientSupport@pinionglobal.com](mailto:ClientSupport@pinionglobal.com)



**pinion**

[pinionglobal.com](http://pinionglobal.com)