



# HUBSYNC CLIENT

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## 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.

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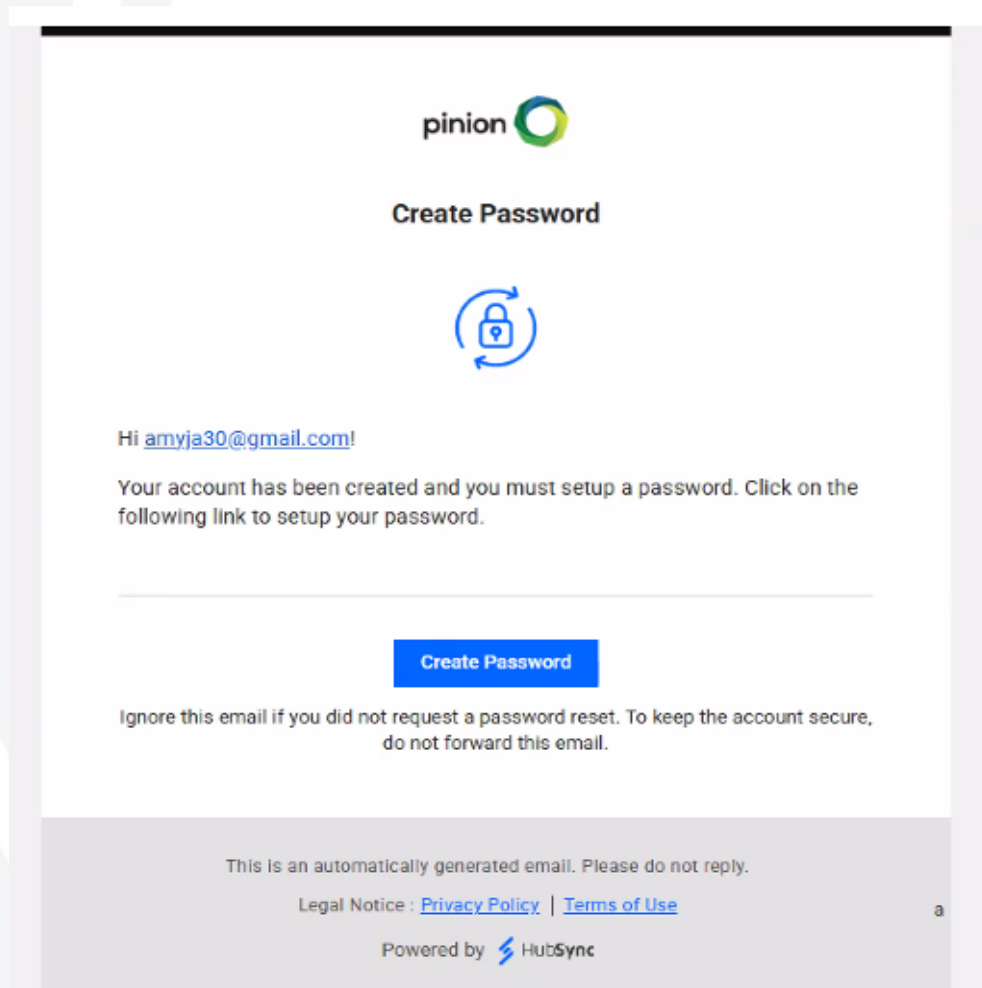
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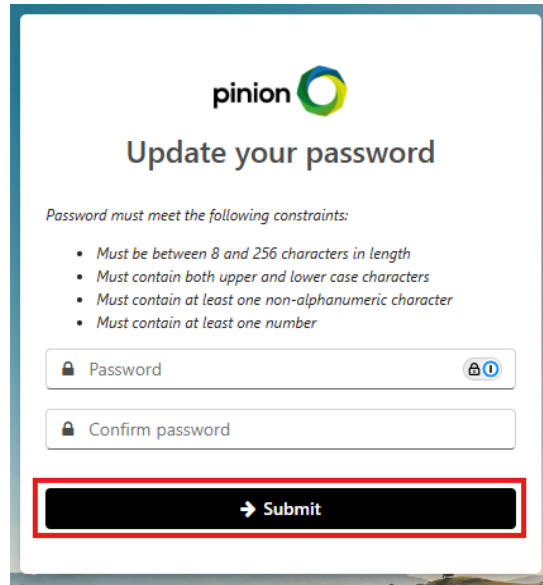
## How to Sign Up

**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.



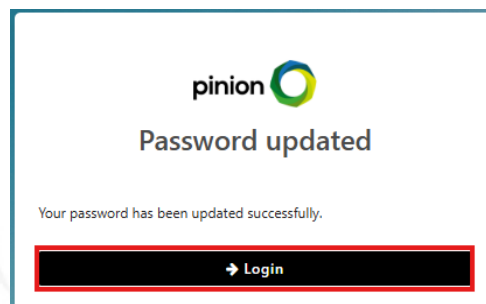
**Step 2: Create Password** - To finish creating your account, enter a password that meets all the requirements listed. When complete, click **“Submit”**.

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



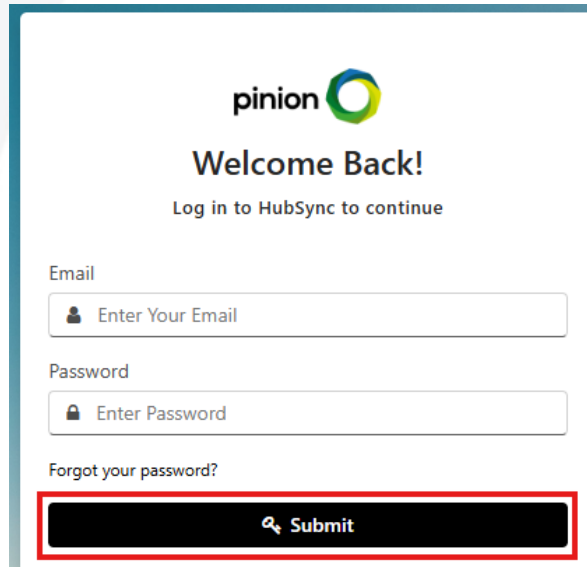
The screenshot shows a web form titled "Update your password" with the Pinion logo at the top. Below the title, it states "Password must meet the following constraints:" followed by a bulleted list: "Must be between 8 and 256 characters in length", "Must contain both upper and lower case characters", "Must contain at least one non-alphanumeric character", and "Must contain at least one number". There are two input fields: "Password" and "Confirm password", both with lock icons. At the bottom, a black button with a right arrow and the text "Submit" is highlighted with a red border.

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



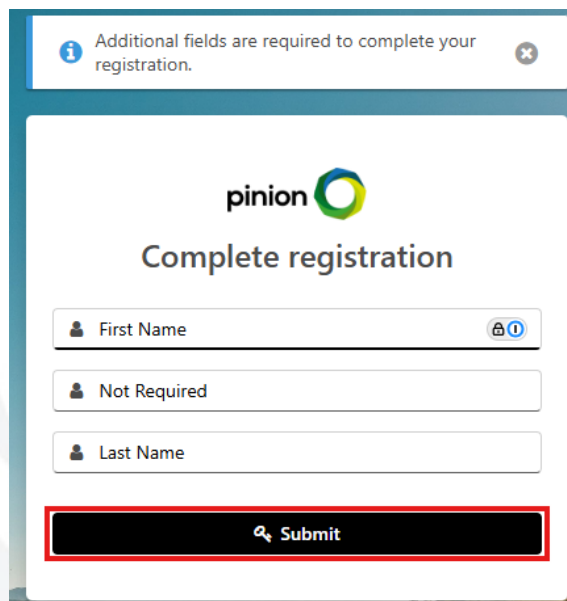
The screenshot shows a confirmation screen titled "Password updated" with the Pinion logo at the top. Below the title, it says "Your password has been updated successfully." At the bottom, a black button with a right arrow and the text "Login" is highlighted with a red border.

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



The image shows a sign-in form for Pinion HubSync. At the top is the Pinion logo, followed by the text "Welcome Back!" and "Log in to HubSync to continue". Below this are two input fields: "Email" with a placeholder "Enter Your Email" and "Password" with a placeholder "Enter Password". A link "Forgot your password?" is located below the password field. At the bottom, a black "Submit" button with a magnifying glass icon is highlighted with a red border.

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



The image shows a "Complete registration" form for Pinion HubSync. At the top, a message states "Additional fields are required to complete your registration." with an information icon and a close button. Below this is the Pinion logo and the title "Complete registration". The form contains three input fields: "First Name" (with a required field indicator), "Not Required", and "Last Name" (with a required field indicator). At the bottom, a black "Submit" button with a magnifying glass icon is highlighted with a red border.

**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”**.

The first screenshot shows the 'Enable two-factor' setup screen. It includes a dropdown for 'Select a method' (set to SMS), a 'Country Code' dropdown (set to +1 United States), a 'Mobile phone' input field, a 'Send a one-time code' button, and a 'Verification code' input field. A red box highlights the 'Enable' button at the bottom. A notification at the top states: 'You must configure two-factor in order to continue.' The second screenshot shows the 'Enable two-factor' confirmation screen. It displays 10 recovery codes in a grid: KLV3B-BGMBK, J2PNG-WMSS, 8D5VC-49QSL, 7SFPR-ZHVQR, B7X3N-YGDTJ, Y63RJ-KJ657, 5Y4NK-6T63Y, VFMQT-QRMJB, CCN4J-R3VMX, and 6J9QV-JQ9GL. A red box highlights the 'Done' button at the bottom.

**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.

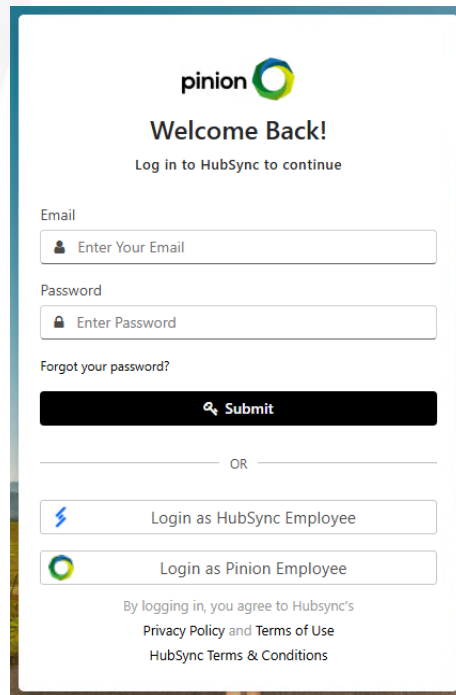
The screenshot shows the 'Acceptable Use Terms and Policy' screen with a date of '1 Jan, 2025'. It contains a scrollable text area with the following text: 'As a precondition to accessing this online offering and the resulting tax services (collectively, “Services”) provided by HubSync US, LLP or any of its subsidiaries (collectively, “HubSync”) and in utilizing any requested password and username, you agree to abide by the following terms and conditions (“Terms”):' followed by two numbered points. Point 1 discusses content submission and license. Point 2 discusses ownership of services. At the bottom, there are 'Decline' and 'Accept' buttons, with the 'Accept' button highlighted by a red box.

## How to Log in to HubSync

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

### Logging In

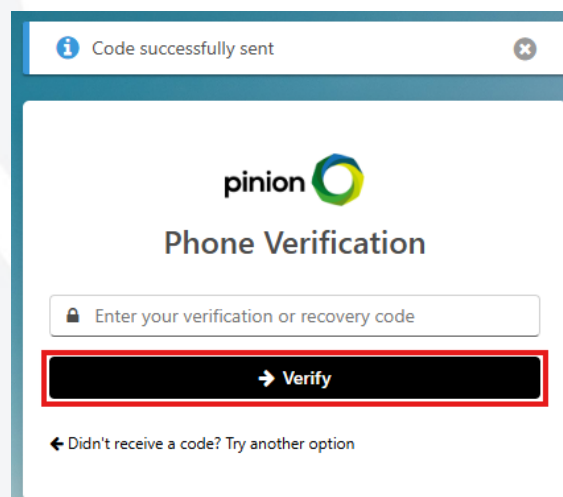
Access the HubSync platform by visiting the login site. Enter your credentials to log in.



The login page features the Pinion logo at the top, followed by the text "Welcome Back!" and "Log in to HubSync to continue". Below this are input fields for "Email" (with a placeholder "Enter Your Email") and "Password" (with a placeholder "Enter Password"). A link for "Forgot your password?" is located below the password field. A black "Submit" button with a magnifying glass icon is positioned below the input fields. A horizontal line with "OR" in the center separates the standard login from alternative options. Below the line are two buttons: "Login as HubSync Employee" (with a lightning bolt icon) and "Login as Pinion Employee" (with the Pinion logo icon). At the bottom, a disclaimer states: "By logging in, you agree to Hubsync's Privacy Policy and Terms of Use HubSync Terms & Conditions".

### Verification Code Process

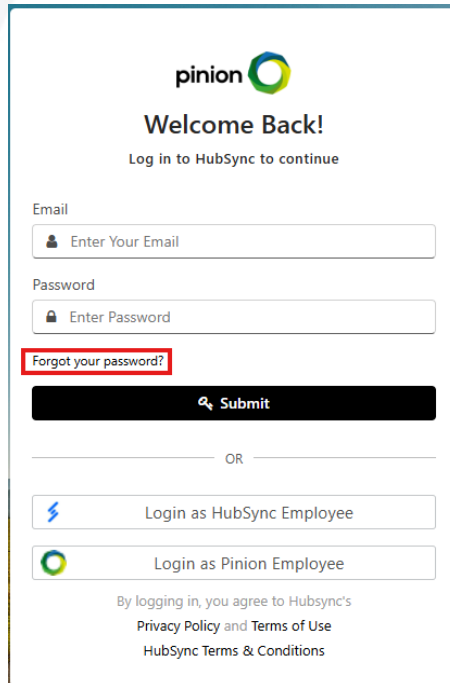
For added security, you may be required to enter a verification code that will be sent to the method you selected when signing up for your account. Follow the prompts to complete this process.



The verification screen is titled "Phone Verification" and features the Pinion logo. It includes a notification bar at the top that says "Code successfully sent". Below the title is an input field with a lock icon and the placeholder text "Enter your verification or recovery code". A black "Verify" button with a right-pointing arrow is highlighted with a red border. At the bottom, there is a link that says "← Didn't receive a code? Try another option".

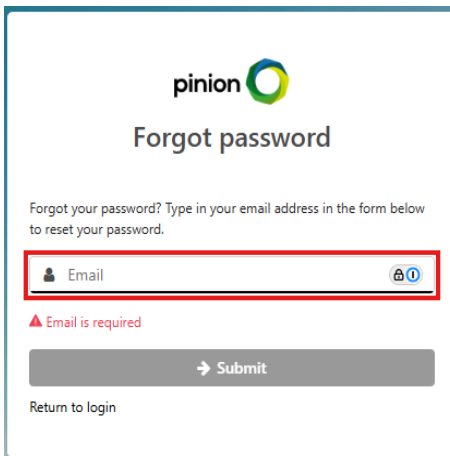
## Resetting Your Password

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



The image shows the Pinion login interface. At the top is the Pinion logo and the text "Welcome Back! Log in to HubSync 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 link "Forgot your password?". Below the password field is a black "Submit" button. Underneath is an "OR" separator, followed by two buttons: "Login as HubSync Employee" (with a blue lightning bolt icon) and "Login as Pinion Employee" (with the Pinion logo icon). At the bottom, there is a disclaimer: "By logging in, you agree to HubSync's Privacy Policy and Terms of Use HubSync Terms & Conditions".

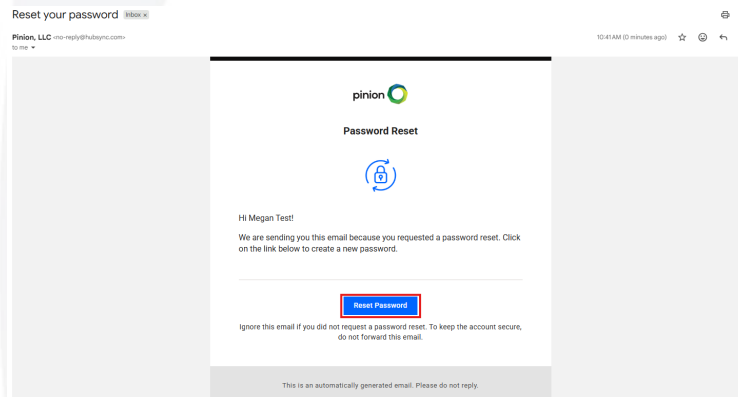
**Step 2:** You will be redirected to input the email address that you used during sign-up.



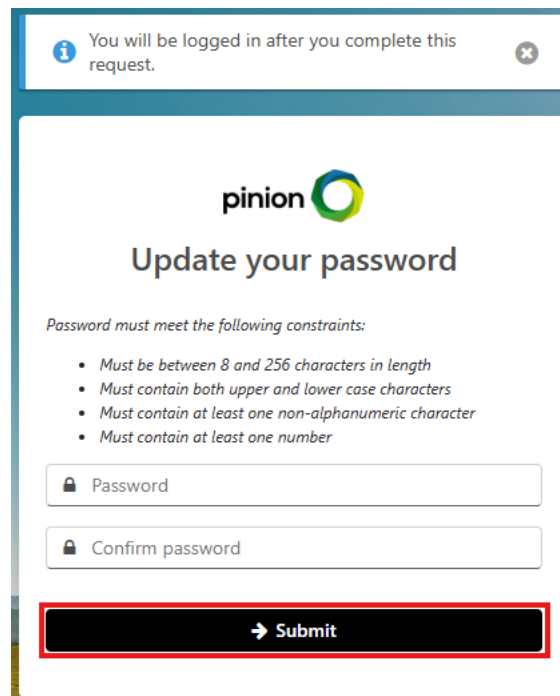
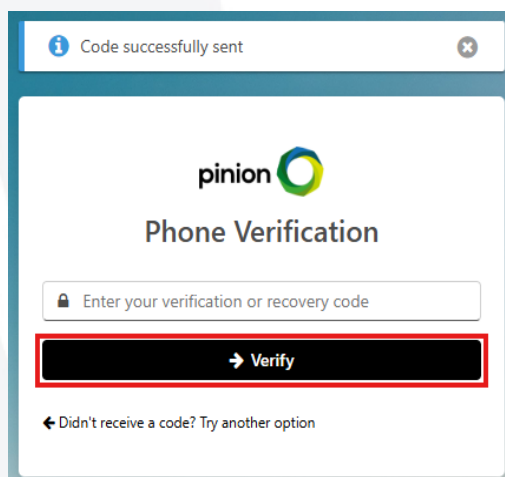
The image shows the Pinion "Forgot password" screen. At the top is the Pinion logo and the heading "Forgot password". Below this is the instruction: "Forgot your password? Type in your email address in the form below to reset your password." There is a single input field labeled "Email" with a red box around it. Below the input field is a red error message: "Email is required". At the bottom is a grey "Submit" button and 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.

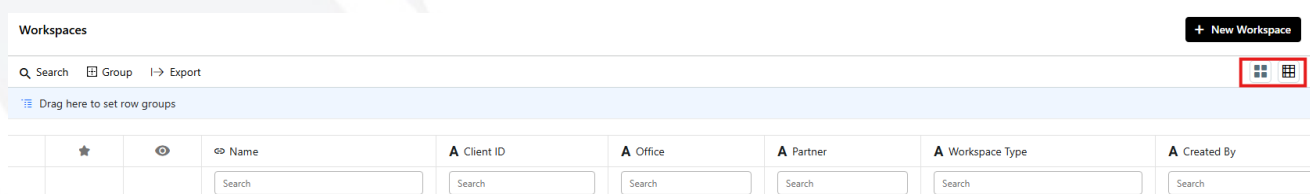


**Step 4:** After the code is verified, update your password and click **“Submit.”**



## 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.



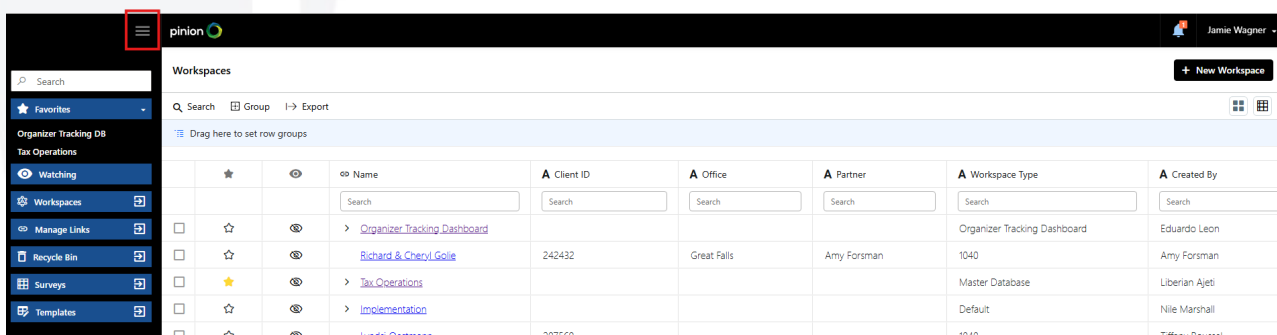
## Managing Your Workspace

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.

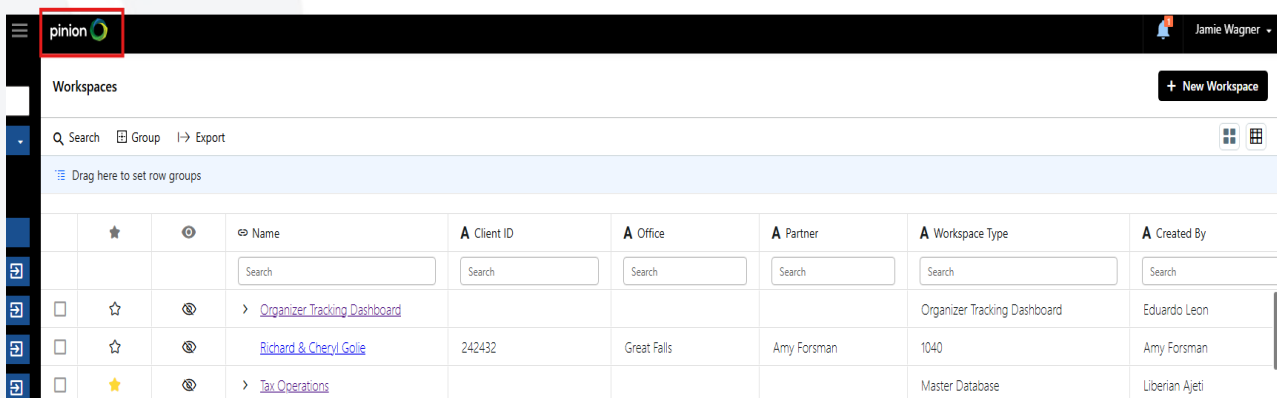


The screenshot shows the Pinion Workspaces interface. On the left, there is a sidebar with a search bar and a list of workspace categories: Favorites, Organizer Tracking DB, Tax Operations, Watching, Workspaces, Manage Links, Recycle Bin, Surveys, and Templates. The main area displays a table of workspaces with columns for Name, Client ID, Office, Partner, Workspace Type, and Created By. A red box highlights the Pinion logo in the top left corner of the interface.

	☆	👁	🔍 Name	🔍 Client ID	🔍 Office	🔍 Partner	🔍 Workspace Type	🔍 Created By
			> <a href="#">Organizer Tracking Dashboard</a>				Organizer Tracking Dashboard	Eduardo Leon
			> <a href="#">Richard &amp; Cheryl Galle</a>	242432	Great Falls	Amy Forsman	1040	Amy Forsman
			> <a href="#">Tax Operations</a>				Master Database	Liberian Ajeti
			> <a href="#">Implementation</a>				Default	Nile Marshall
			> <a href="#">Lundin Partnerships</a>	317269			1548	Tiffany Brumfield

## Navigate Back to the Homepage

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



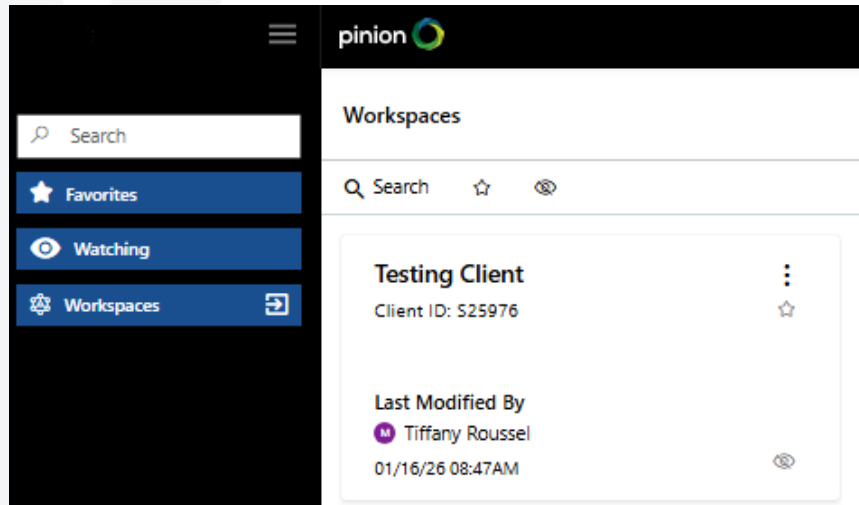
The screenshot shows the Pinion Workspaces interface. On the left, there is a sidebar with a search bar and a list of workspace categories: Favorites, Organizer Tracking DB, Tax Operations, Watching, Workspaces, Manage Links, Recycle Bin, Surveys, and Templates. The main area displays a table of workspaces with columns for Name, Client ID, Office, Partner, Workspace Type, and Created By. A red box highlights the Pinion logo in the top left corner of the interface.

	☆	👁	🔍 Name	🔍 Client ID	🔍 Office	🔍 Partner	🔍 Workspace Type	🔍 Created By
			> <a href="#">Organizer Tracking Dashboard</a>				Organizer Tracking Dashboard	Eduardo Leon
			> <a href="#">Richard &amp; Cheryl Galle</a>	242432	Great Falls	Amy Forsman	1040	Amy Forsman
			> <a href="#">Tax Operations</a>				Master Database	Liberian Ajeti

## Workspace

### Navigating your Workspace

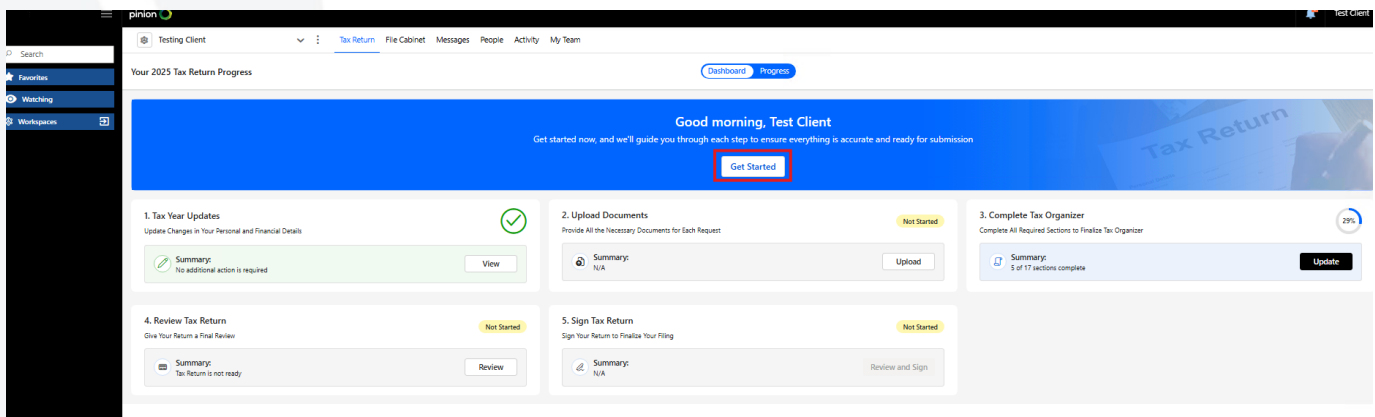
Your workspace will be displayed as the one shown below if in Tile Mode:



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.

The screenshot shows the 'Tax Year Updates' section of the HubSync client interface. At the top, there is a navigation bar with 'Testing Client' and a 'Tax Return' tab. Below this, a progress bar shows five steps: 1. Tax Year Updates (active), 2. Upload Documents, 3. Complete Tax Organizer, 4. Review Tax Return, and 5. Sign Tax Return. The main content area is titled 'Tax Year Updates' and contains two sections: 'Home and Family' and 'Income'. Each section has a 'Mark all as' button with 'Yes' and 'No' options. The 'Home and Family' section contains six questions with 'Yes' and 'No' buttons. The 'Income' section contains six questions with 'Yes' and 'No' buttons. A green checkmark icon is visible in the top right corner of the 'Tax Year Updates' section.

Testing Client

Tax Return

File Cabinet Messages People Activity My Team

Your 2025 Tax Return Progress

Dashboard Progress

1. Tax Year Updates 2. Upload Documents 3. Complete Tax Organizer 4. Review Tax Return 5. Sign Tax Return

Upload File Area

Tax Year Updates

Home and Family

Mark all as Yes No

1. Did your marital status change since last year? Yes No

2. Did you move to a different home during the tax year? Yes No

3. Were there any changes in dependents from the prior year (or if a new user, select 'Yes' to enter dependents)? Yes No

4. Did you purchase or sell a home or other real estate during the tax year? Yes No

5. 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

6. Do you have a home office? Yes No

Income

Mark all as Yes No

1. Were you or your spouse self-employed during the tax year? Yes No

2. Did you or your spouse have rental and/or royalty income during the tax year? Yes No

3. Did you or your spouse have farm income or expenses during the tax year? Yes No

4. Did you receive alimony? Yes No

5. Did you have any debts cancelled or forgiven? Yes No

6. 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.

The screenshot shows the bottom right corner of the HubSync client interface. It features three buttons: 'Print', 'Submit to Tax Preparer', and 'Next'. The 'Next' button is highlighted with a red rectangular border.

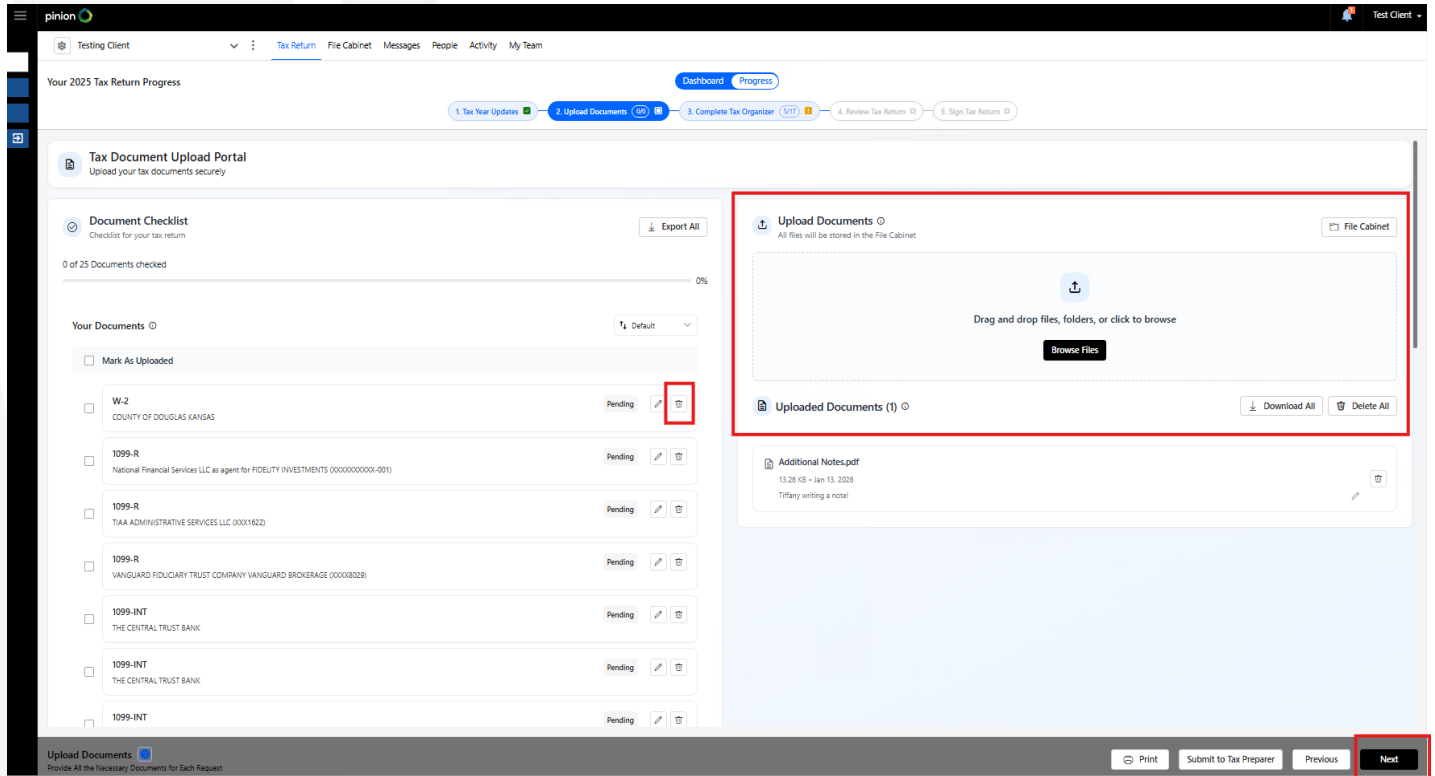
Print

Submit to Tax Preparer

Next

## 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.



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”**.

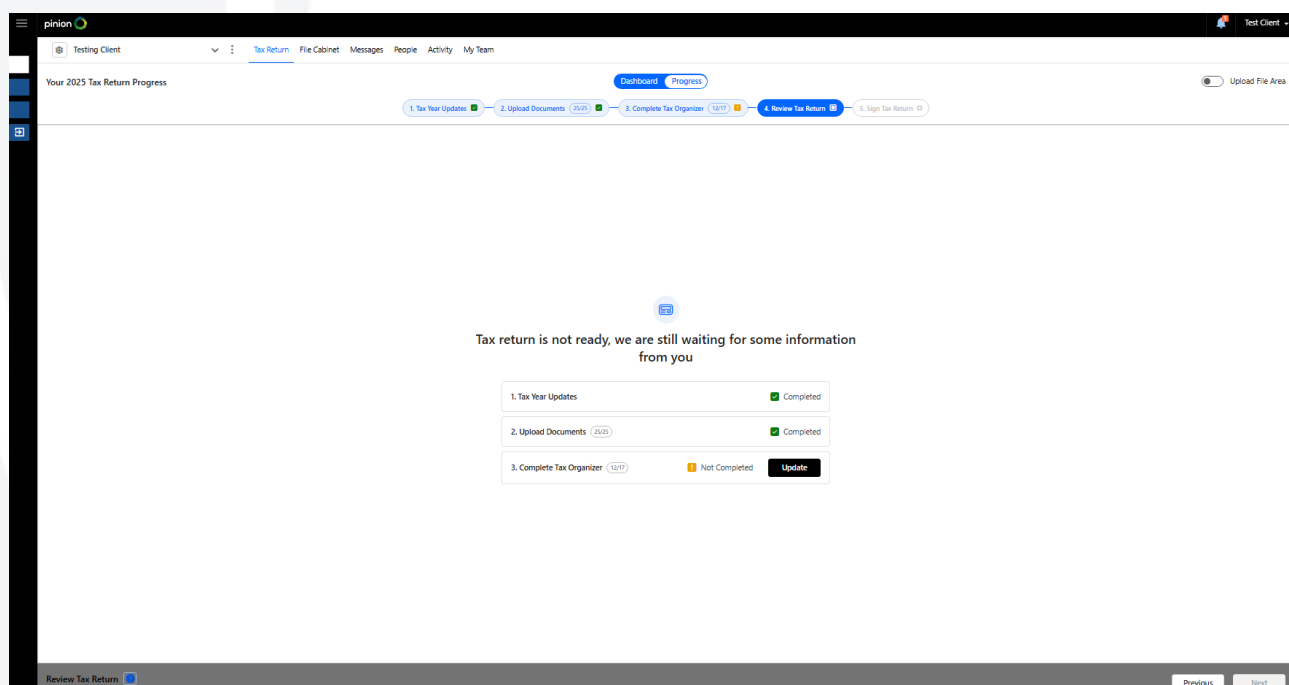
The screenshot displays the Pinion Tax Organizer interface. On the left, a navigation pane titled 'Your Tax Organizer Progress' shows a progress bar at 29% and a list of sections: Personal Information (4/4), Income (6/6), Deductions & Credits (0/5), Other Taxes, Tax Payments (1/2), Household Employment Taxes, and Travel Calendar. The 'Personal Information' section is expanded, showing sub-sections: Taxpayer (checked), Spouse (checked), Dependents (checked), and Contact Information (checked). The main area is titled 'Tax Organizer' and 'Personal Information / Taxpayer'. It contains a progress bar and a list of steps: 1. Tax Year Updates (checked), 2. Upload Documents (checked), 3. Complete Tax Organizer (checked), 4. Review Tax Return (unchecked), and 5. Sign Tax Return (unchecked). The 'Complete Tax Organizer' step is highlighted. Below the progress bar, there are two red boxes: one around the 'Submit to Tax Preparer' button in the top right corner, and another around the 'Next' button in the bottom right corner. The form fields include: 'What's your marital status on December 31?' (Married), 'What's your filing status on December 31?' (Married filing jointly (even if only one had income)), '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', 'Expiration Date' (Select a date), 'Issue Date' (Select a date), and 'State / Province' (Select...).

## 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.

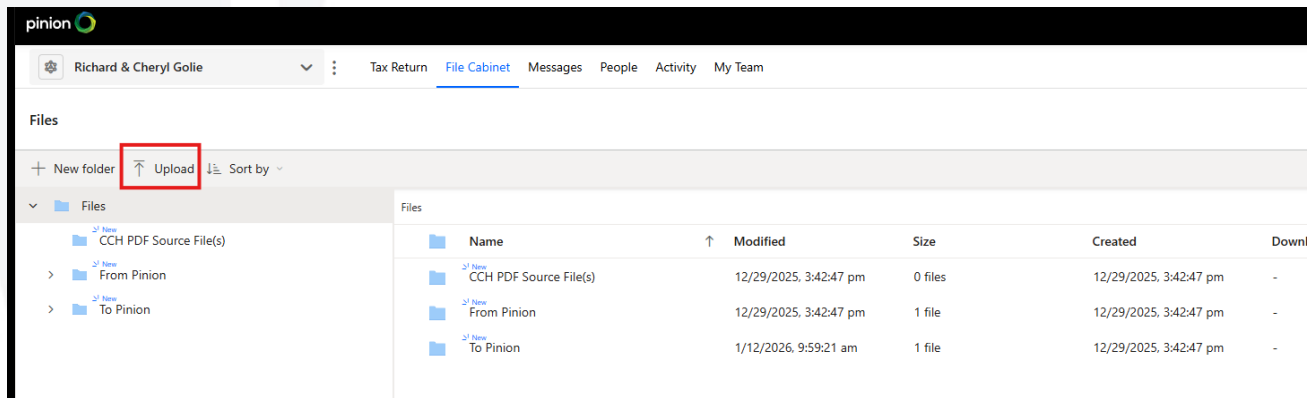
For this tax season we will not be using HubSync to deliver your tax return, if you receive your return electronically, we will continue to use SafeSend through this season.



## 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.





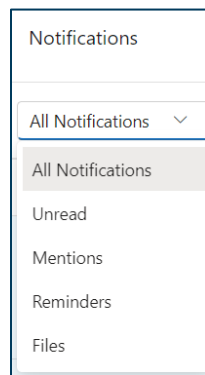
## Notifications

### Viewing Notifications

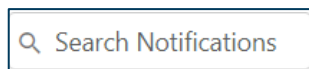
From the dashboard, you can see new notifications on any of your items or tasks if there is a red number on the top of the “bell” icon on the top-right corner of the screen.



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.

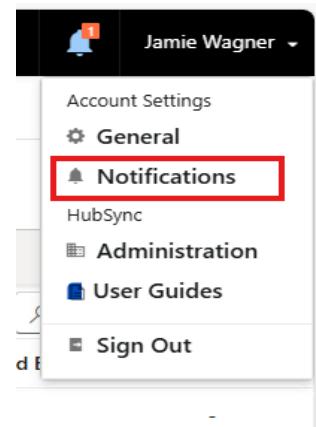


### Email Notifications Preferences

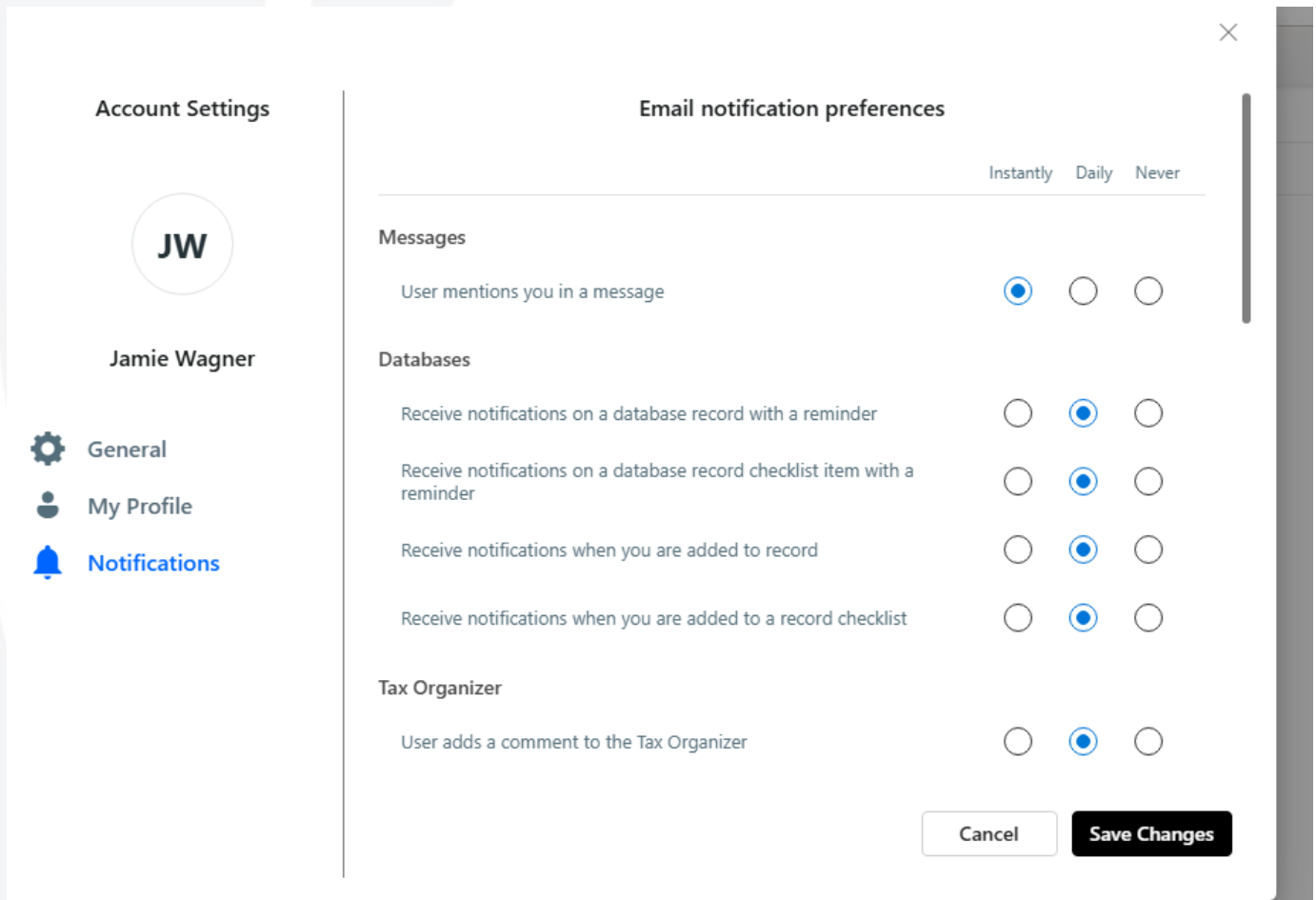
In the top right corner, next to your name, click on the drop-down arrow and select “**Notifications**” to update your email notification preferences.

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).



The screenshot shows a modal window titled "Email notification preferences" with a close button (X) in the top right corner. On the left, the "Account Settings" sidebar is visible, showing the user's profile "Jamie Wagner" and three menu items: "General" (gear icon), "My Profile" (person icon), and "Notifications" (bell icon, which is highlighted in blue). The main content area is titled "Email notification preferences" and features three columns of radio buttons labeled "Instantly", "Daily", and "Never". The settings are organized into three categories: "Messages", "Databases", and "Tax Organizer".

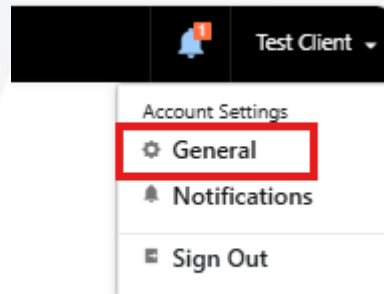
	Instantly	Daily	Never
<strong>Messages</strong>			
User mentions you in a message	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<strong>Databases</strong>			
Receive notifications on a database record with a reminder	<input type="radio"/>	<input checked="" type="radio"/>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

At the bottom right of the dialog are two buttons: "Cancel" and "Save Changes".

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

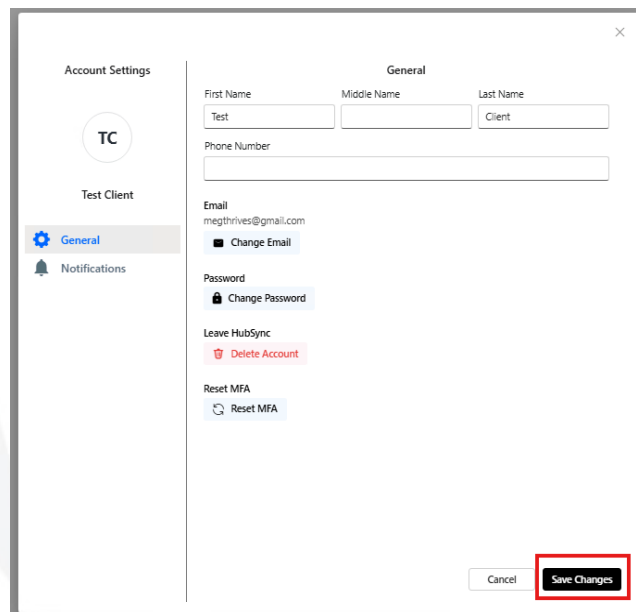
## Manage Your User Settings

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)



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