pinion

# HUBSYNC CLIENT

USER GUIDE

HubSync

Pinionglobal.com

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.

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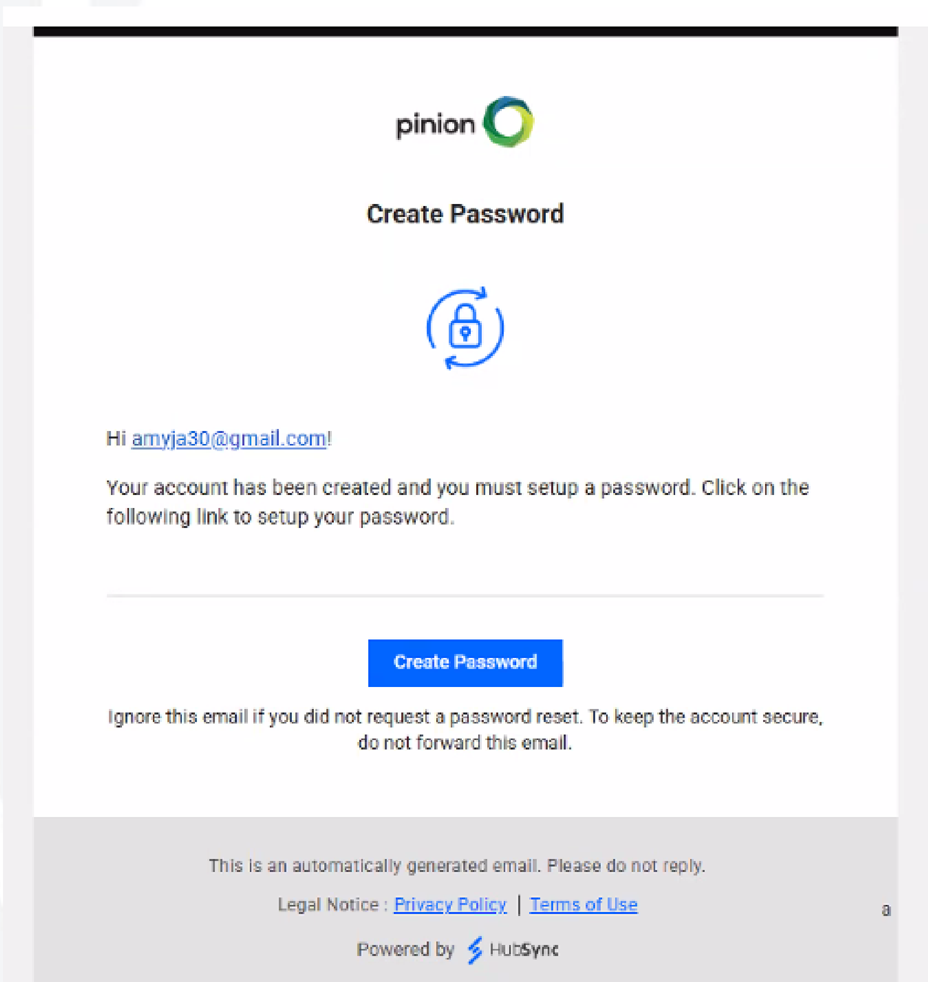
## How to Sign Up

**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.



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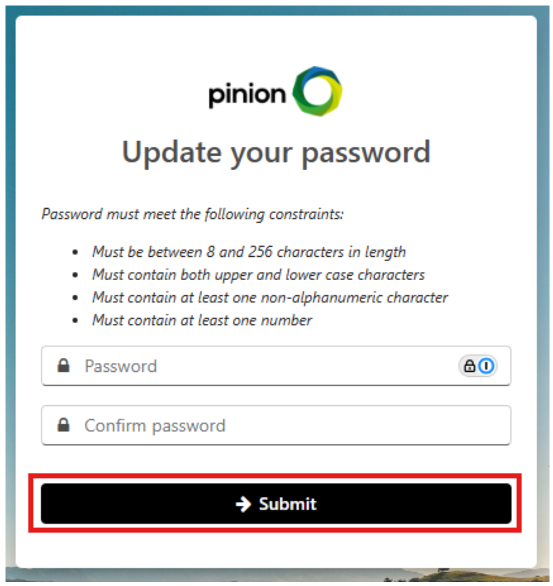
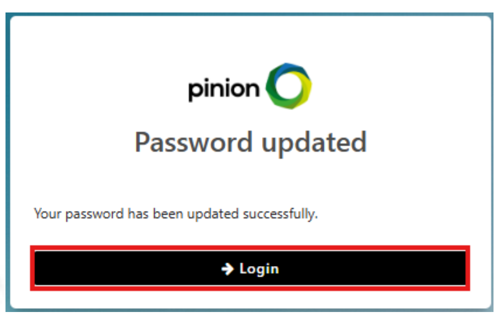
**Step 2: Create Password -** To finish creating your account, enter a password that meets all the requirements listed. When complete, click "**Submit**".

***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. Click on "**Login**".



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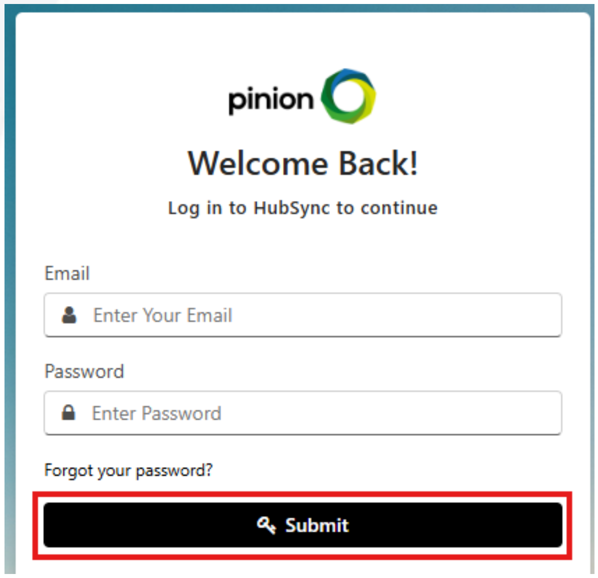
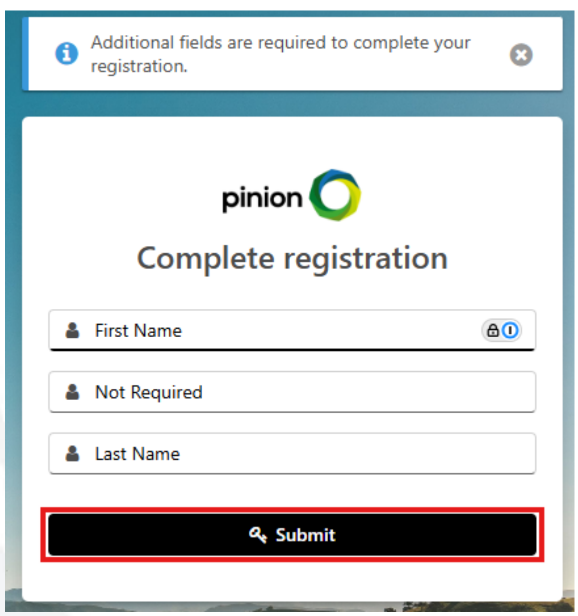
**Step 4: Sign In –** Use your email address and password to log in and click "**Submit**".




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



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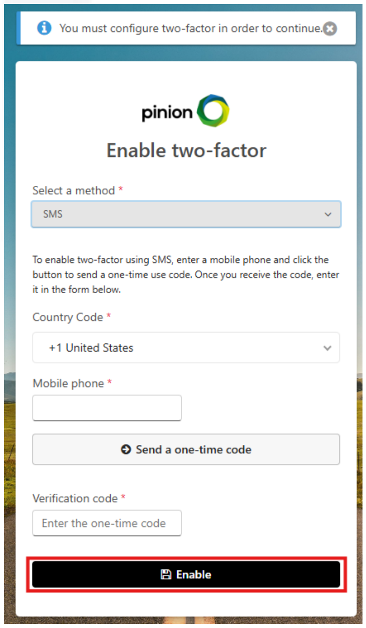
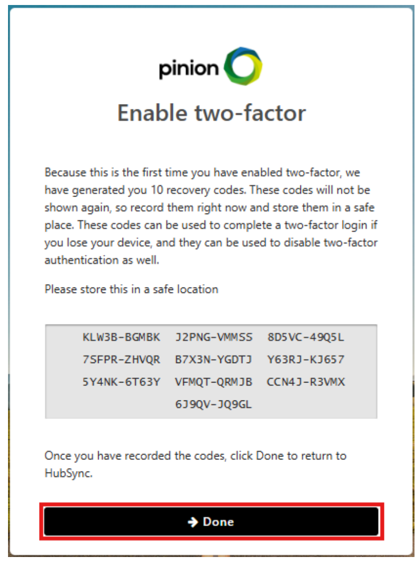
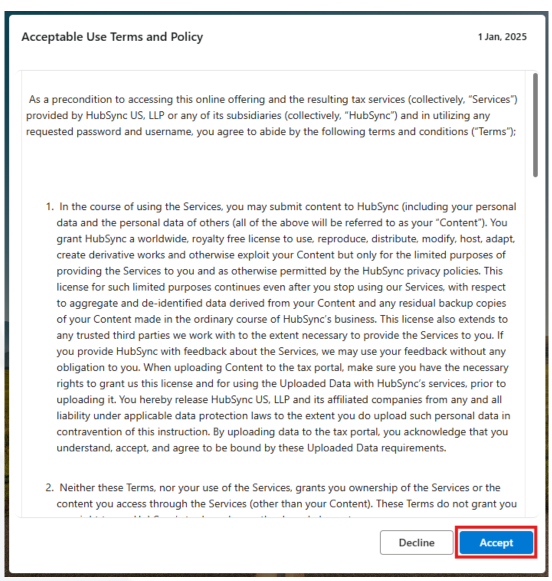
**Step 6: Enable Two-Factor Authentication -** For your security, two-factor authentication must be established.

- 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**".




**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.



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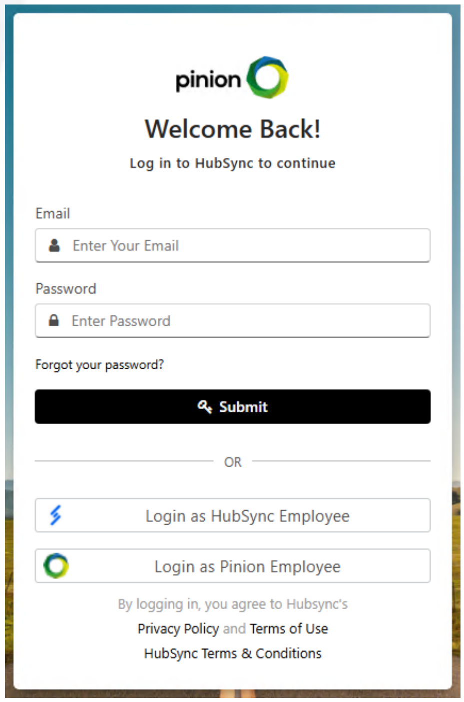
# How to Log in to HubSync

**Login Site** – http://pinionglobal.hubsync.com

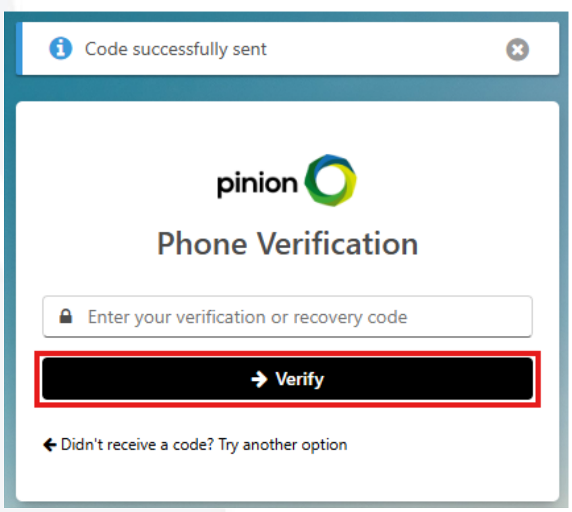
## Logging In

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.



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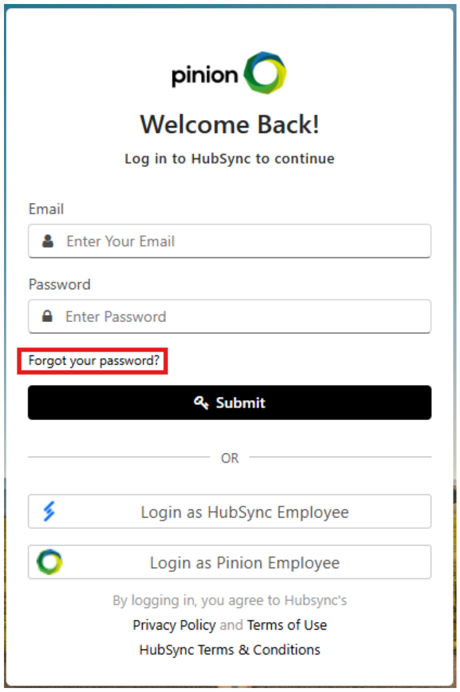
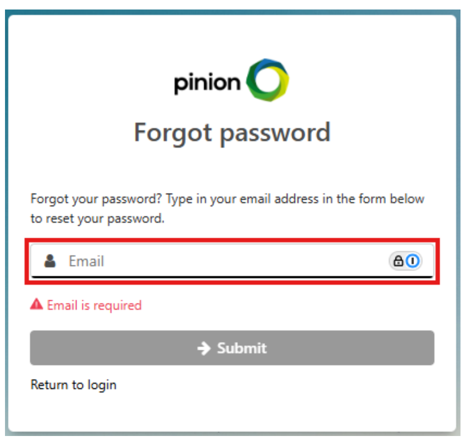
## Resetting Your Password

**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.



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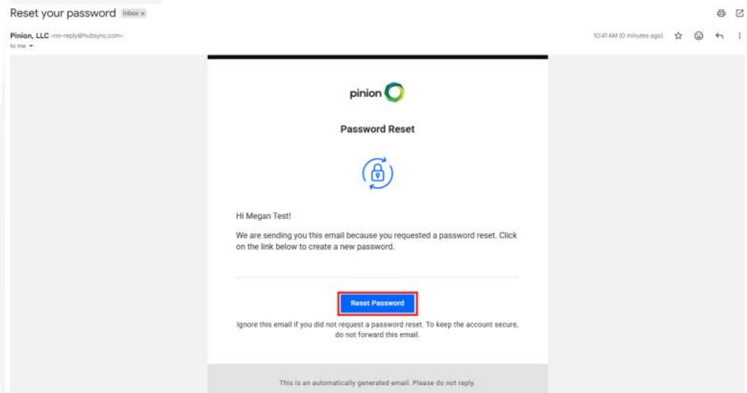
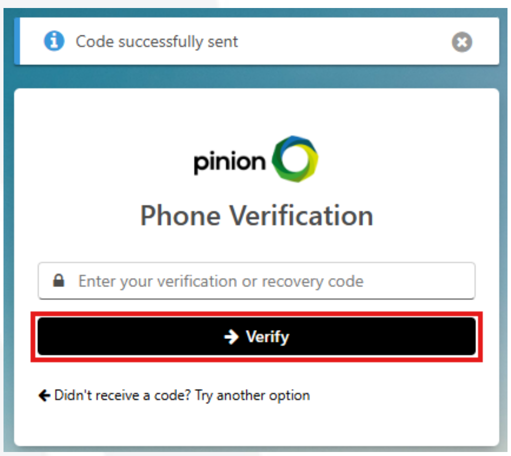
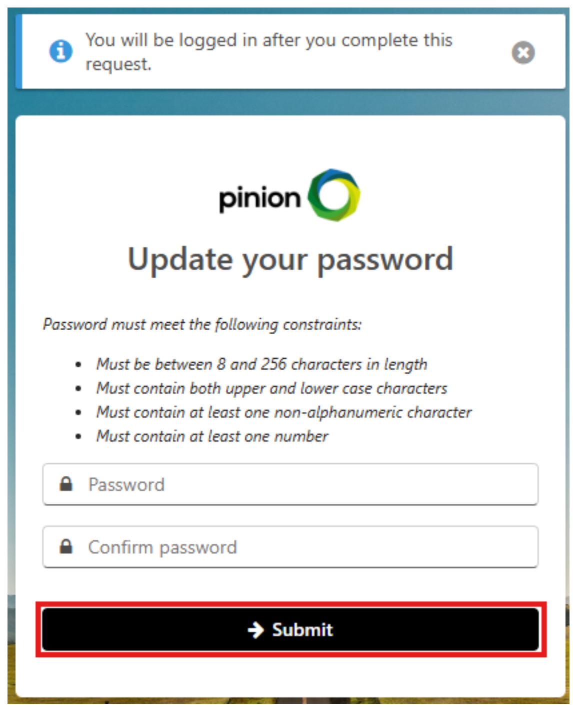
**Step 3:** An email will then be sent containing a link that will allow you to reset your password. Please click "**Reset Password**" to create new password.




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



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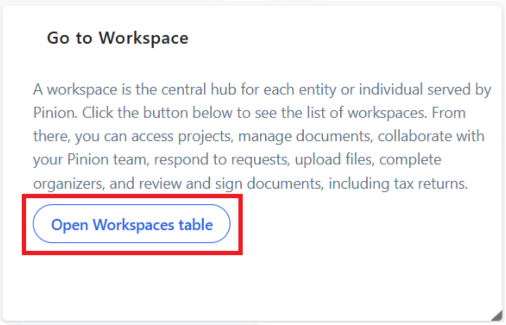
## Navigating the Gateway

The Gateway is your landing page dashboard when you first log in to HubSync.

From here, you will see a collection of tiles that share information and links from HubSync modules and other Pinion information such as Pinion Insights articles, Pinion Invoice Payments, and Pinion Newsletter Subscriptions.

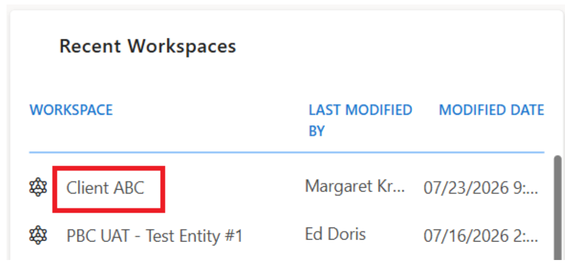
### Go to Workspace Tile

*Click the "Open Workspaces table" button.*



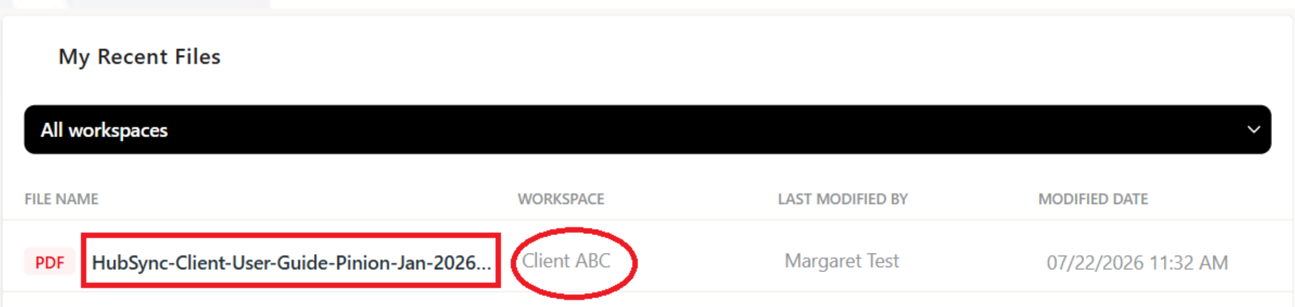

### My Recent Workspaces

*You will see all your workspaces listed here. Click the workspace name to take you to the workspace.*



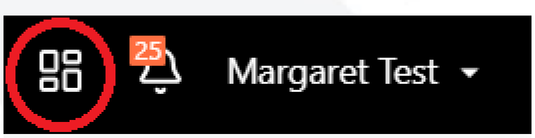

### My Recent Files

*Click the file name to open the file or click the workspace name to go to the workspace.*




### Navigate Back to the Gateway

From anywhere you navigate within HubSync, you can always click on this icon in the top-right-hand corner of the page to return to the Gateway.



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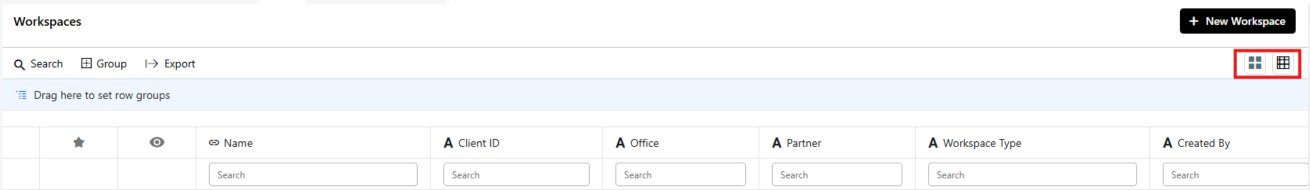
## Setting Up Workspace  Views

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.



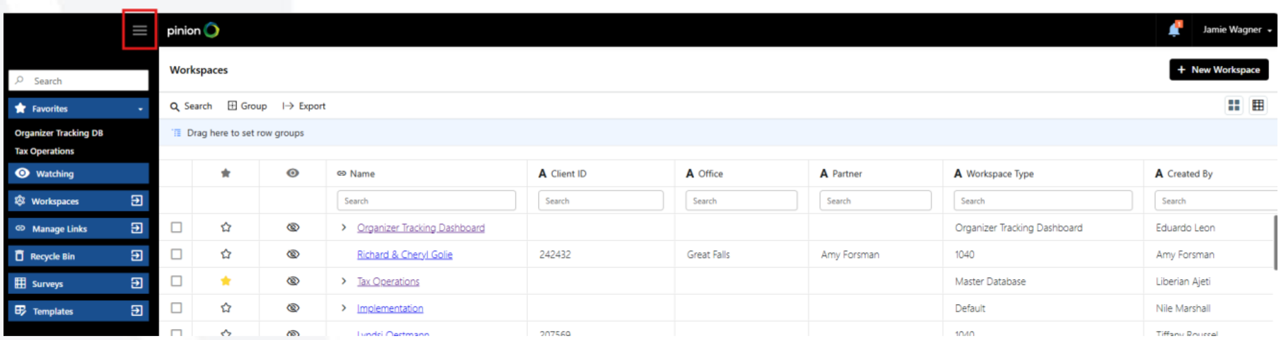

## Managing Your Workspace

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.

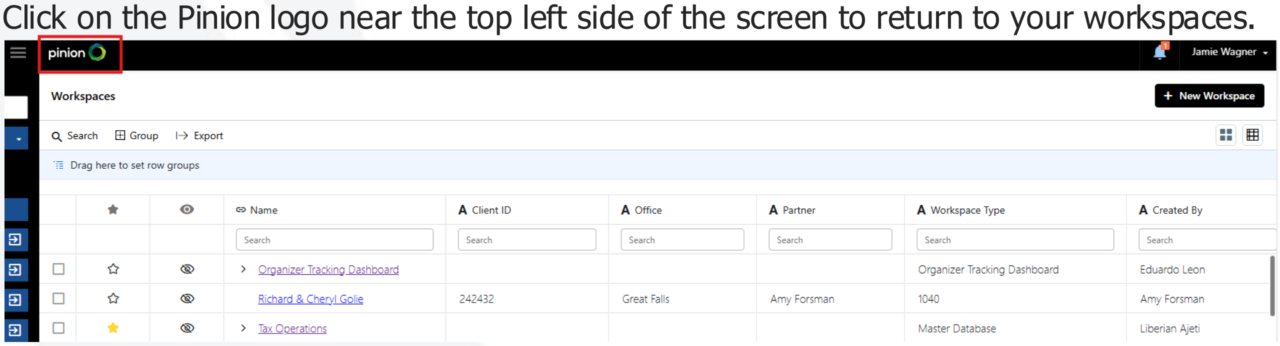
### Navigating Between Multiple Workspaces

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 Workspaces

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



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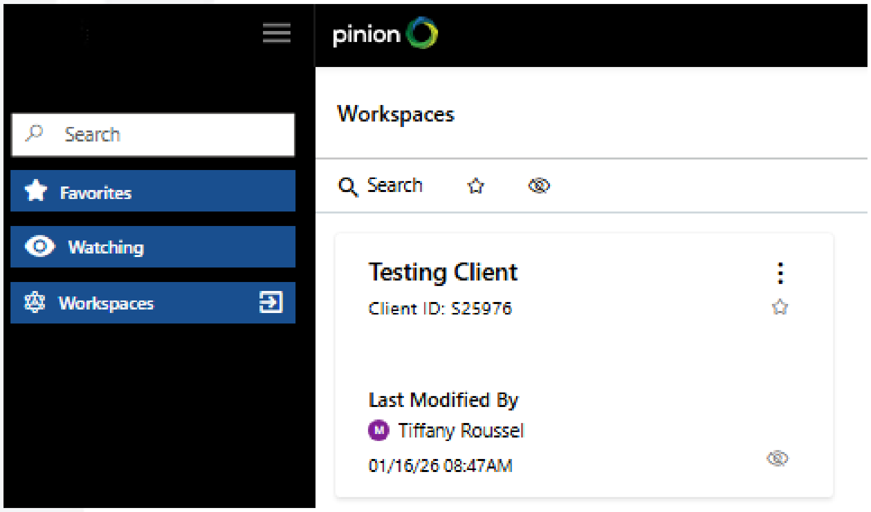
# Workspace

## Navigating your Workspace

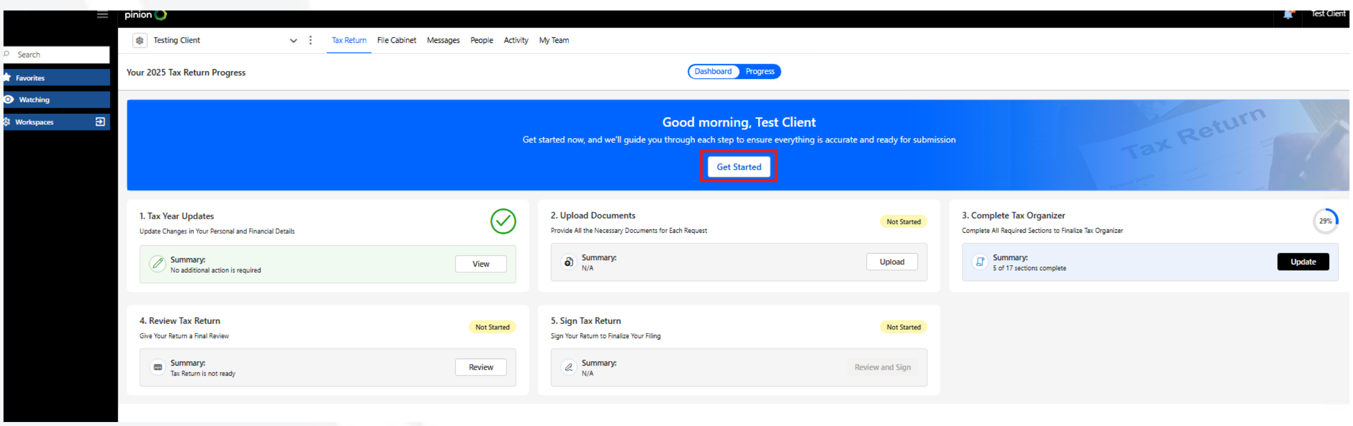
Your workspace will be displayed as the one shown below if in Tile Mode:




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.

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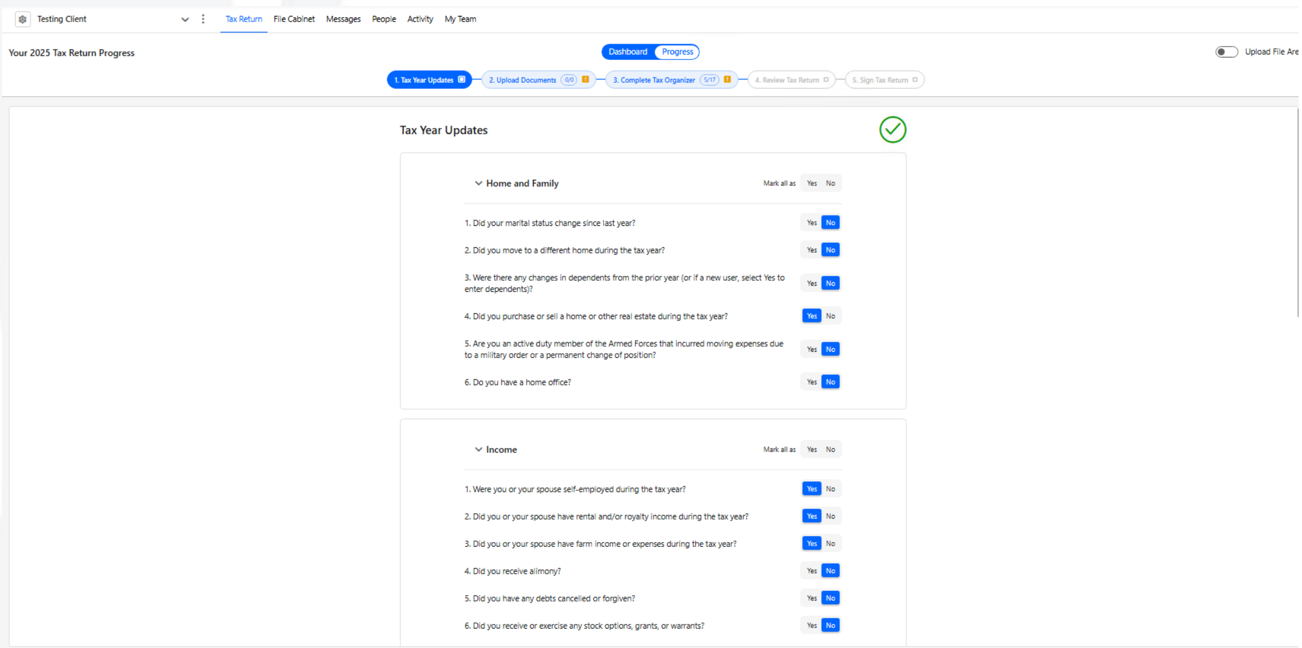
## Organizer Information

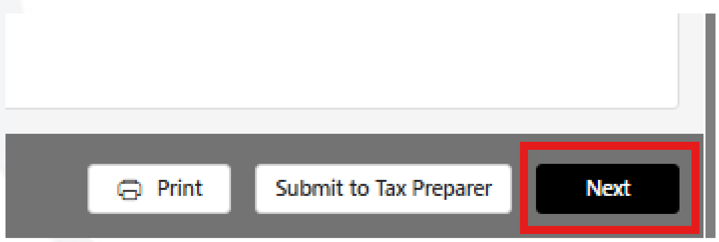
After clicking on "**Get Started**" it will open up to your Organizer.

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.




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



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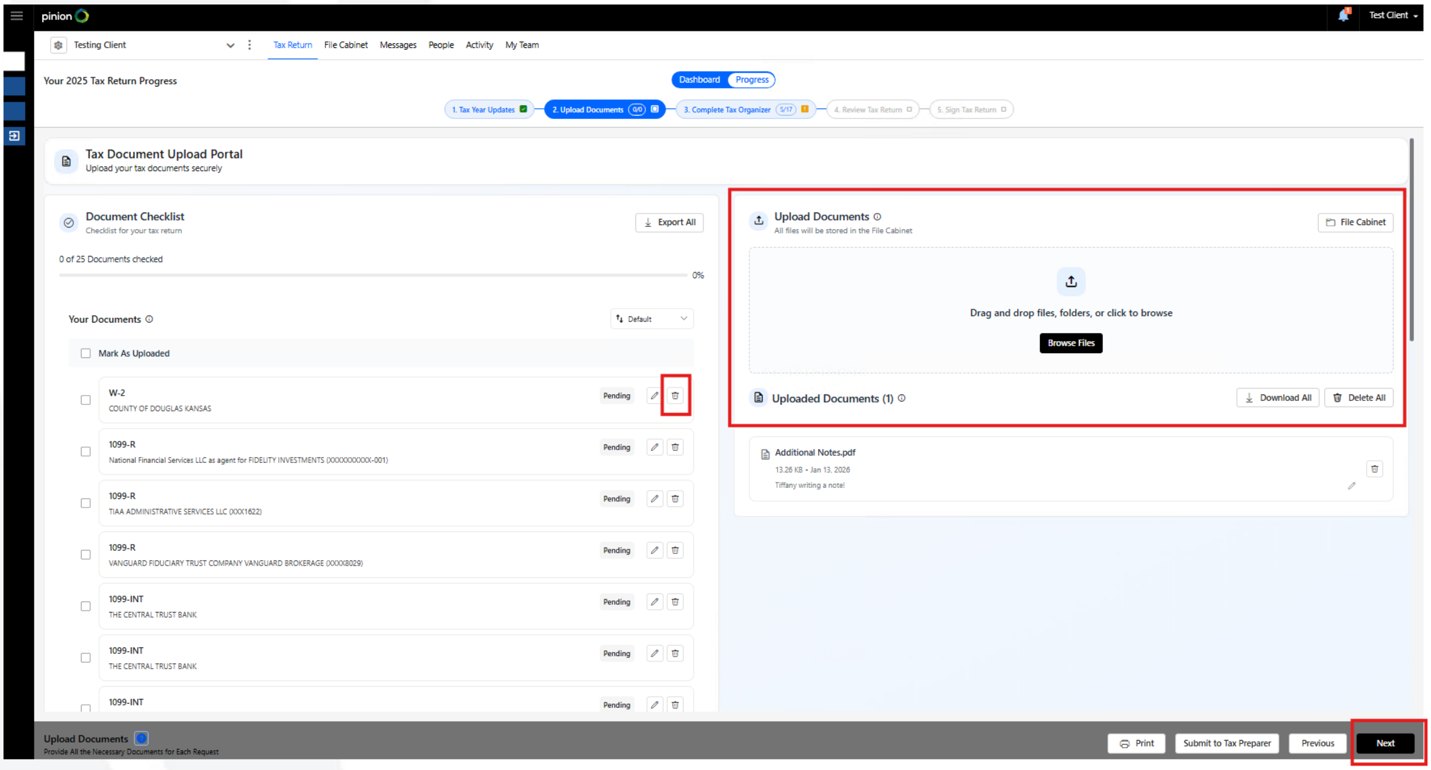
## Uploading Documents

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.

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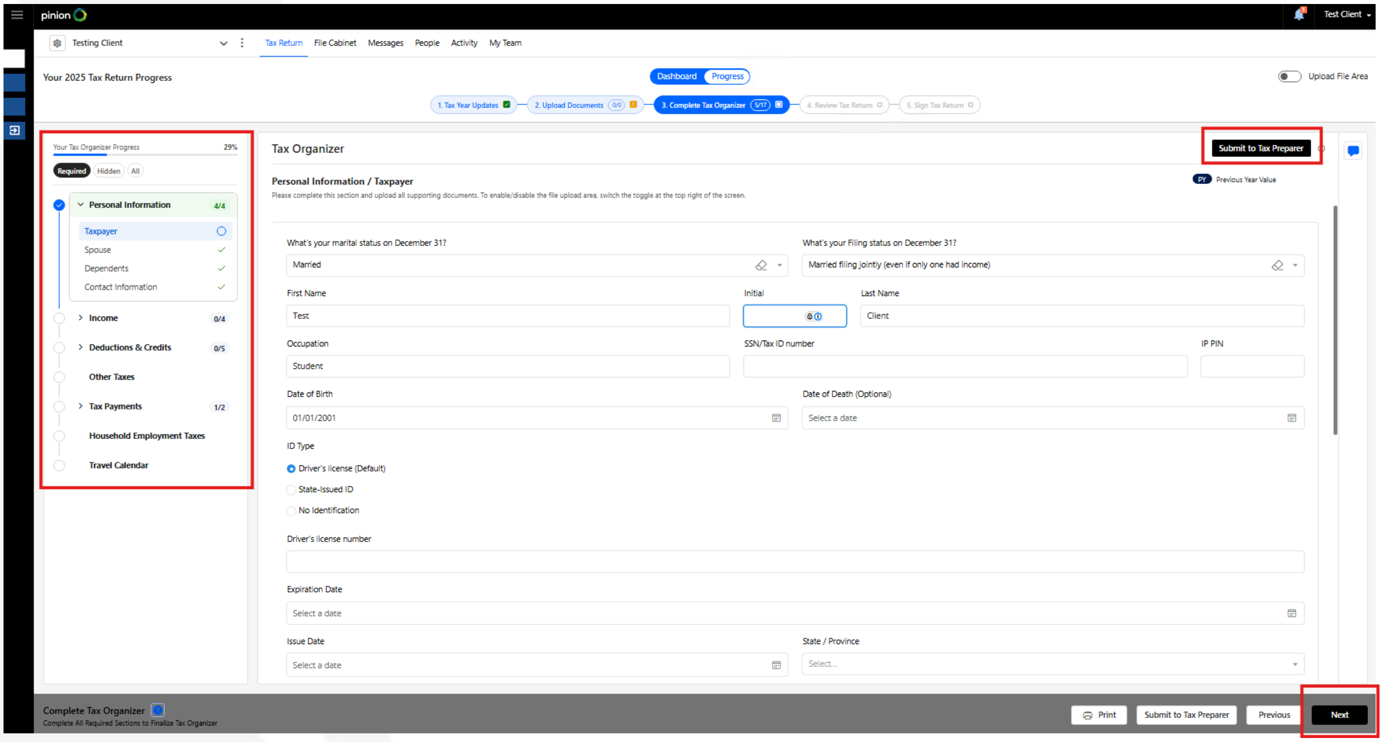
## Filling Out the Organizer

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 <u>not required</u> 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**".



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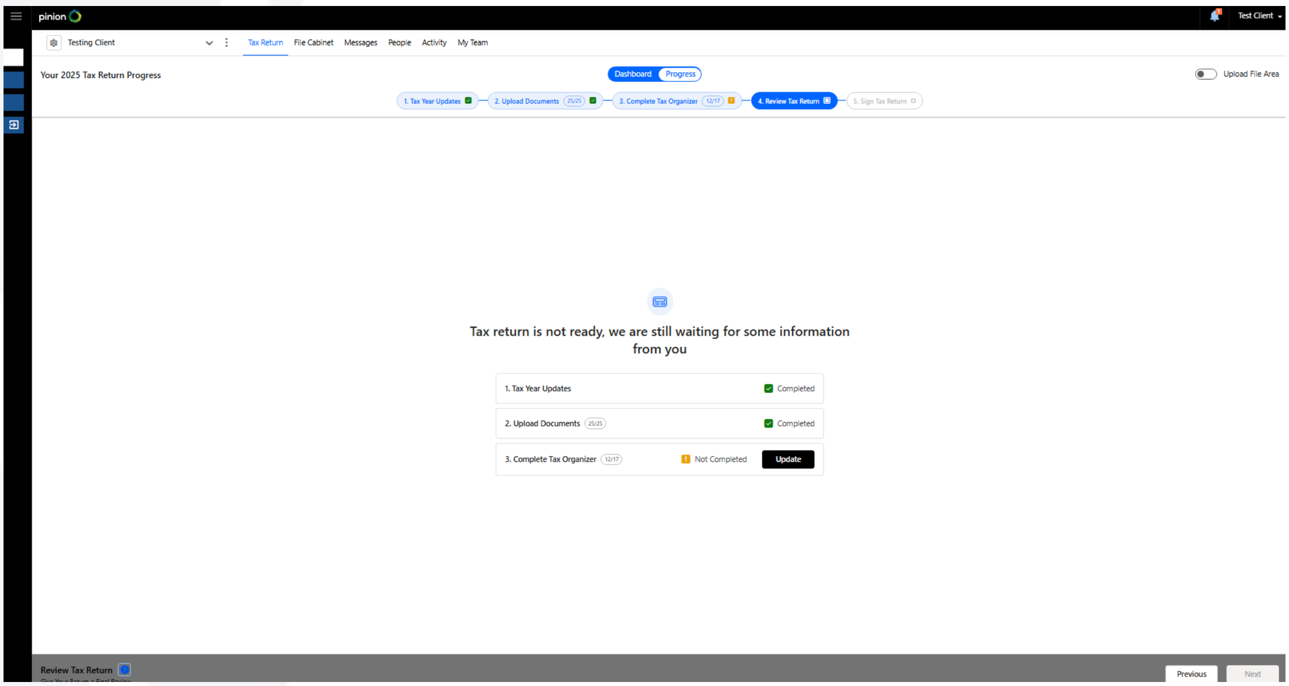
## After Completing Organizer

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.



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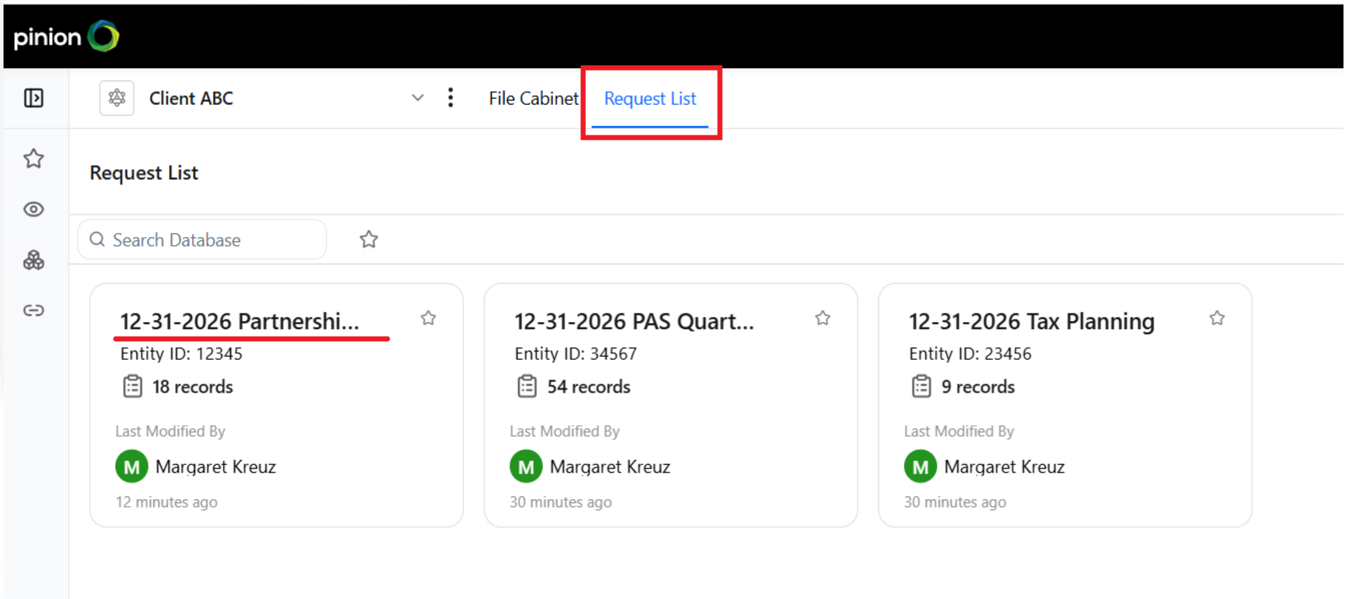
## Working Within the Request List

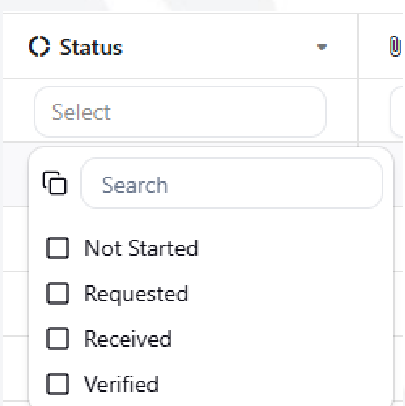
From the Request List area, view and manage individual requests or tasks, including:

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




- **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, requested, received, verified).



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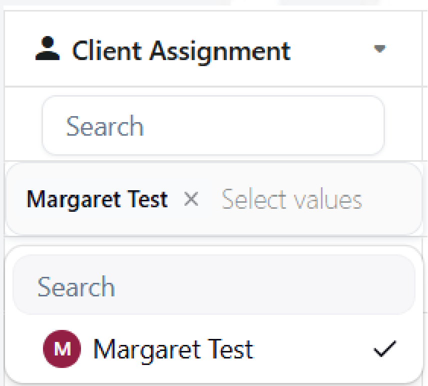
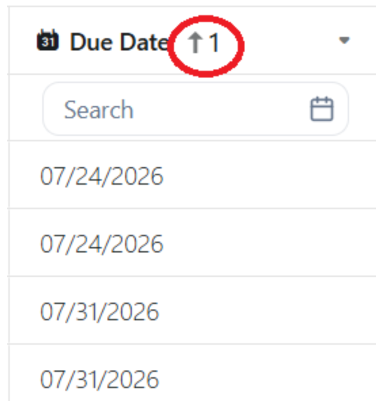
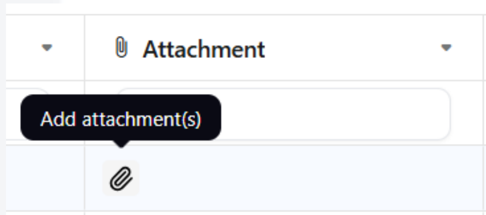
**Client Assignment**: Assign requests to specific team members.
***NOTE***: You can only assign Requests for those that have access to the workspace.



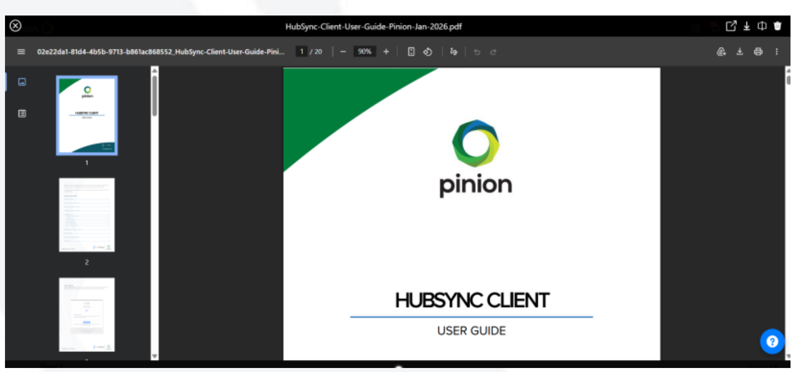

**Due Date**: Review due dates to keep track of deadlines.
Click on the column to sort ascending/descending to manage the priority of request items.




**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 paper clip icon as you hover over 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:



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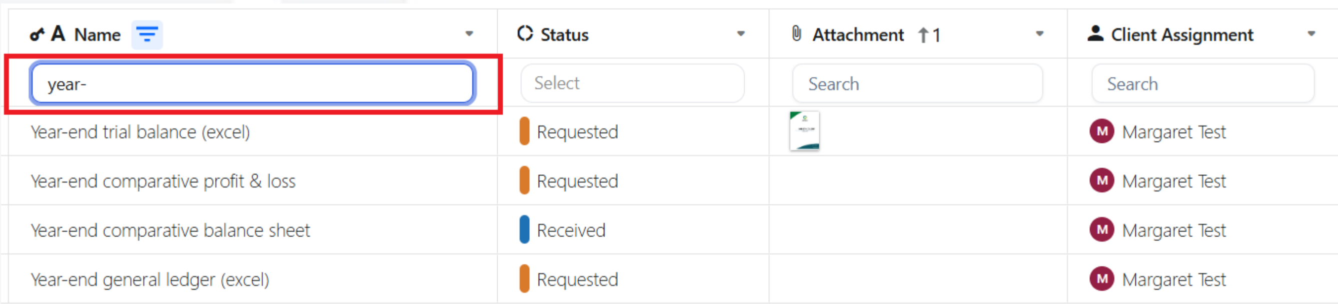
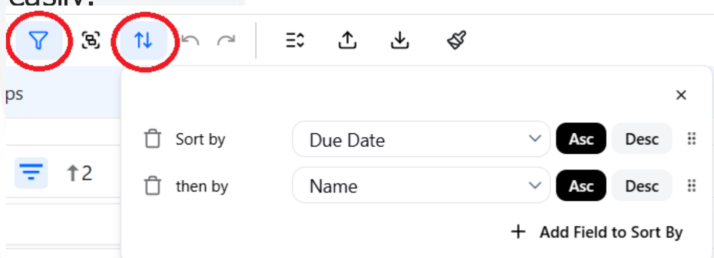
**Grouping, Filtering and Sorting**: Inside each Request List, you have the option to group, filter or sort your data. You can either use the global bar at the top …

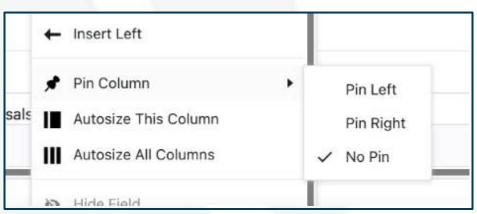



-**OR**- use the in-line grid filters to manipulate and view your data easily.




***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.



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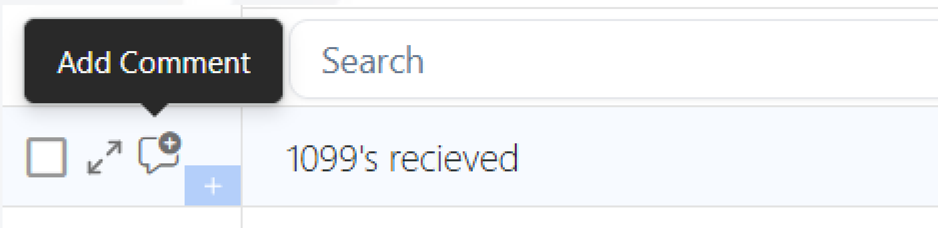
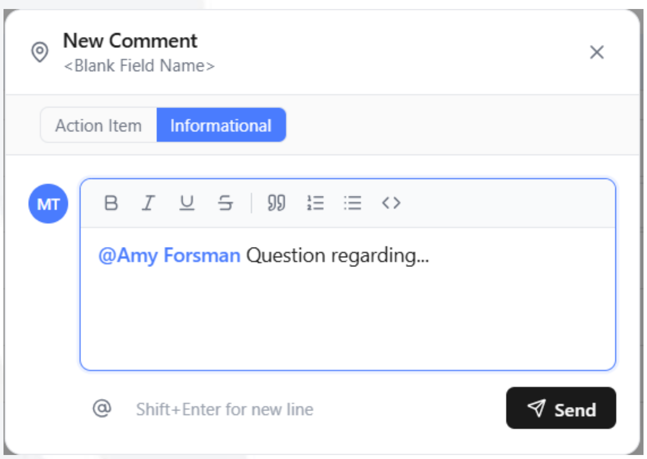
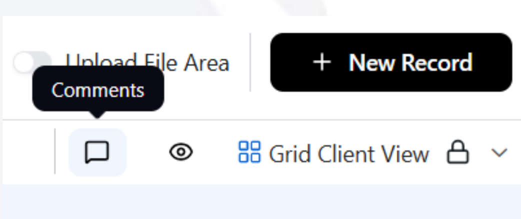
**Messages/Comments on a Request Item**: Communicate about specific requests directly within the item. To message and comment at the record level, hover over the right-hand side of the request item and click on the comment box.

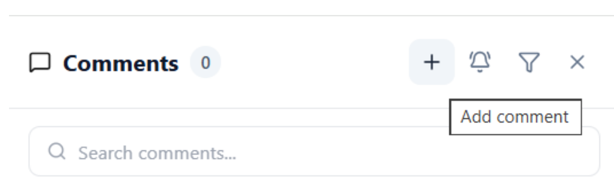



A New Comment box will pop up and you can type your message. You can @ mention other Pinion users or Client users to send them a notification of your message. You will receive an email notification and an in-app notification if another user @ mentions you.




**Messages/Comments on a Request List**: Comments can also be made at the request list level by clicking on the chat box in the top right-hand corner of the request list. A right-hand window pane will appear. Click on the "+" to add a comment. The same New Comment box will pop up.



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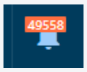
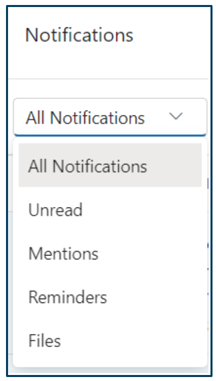
# Notifications

## Viewing Notifications

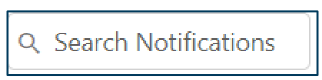
From the dashboard, you can see new notifications on any of your items or tasks if there is a red number on the top of the "bell" icon on the top-right corner of the screen.




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

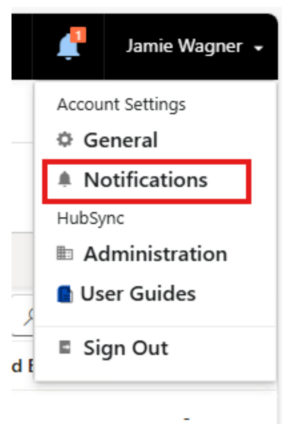



Type into the "Search Notifications" text box to search for a specific notification.




## 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.

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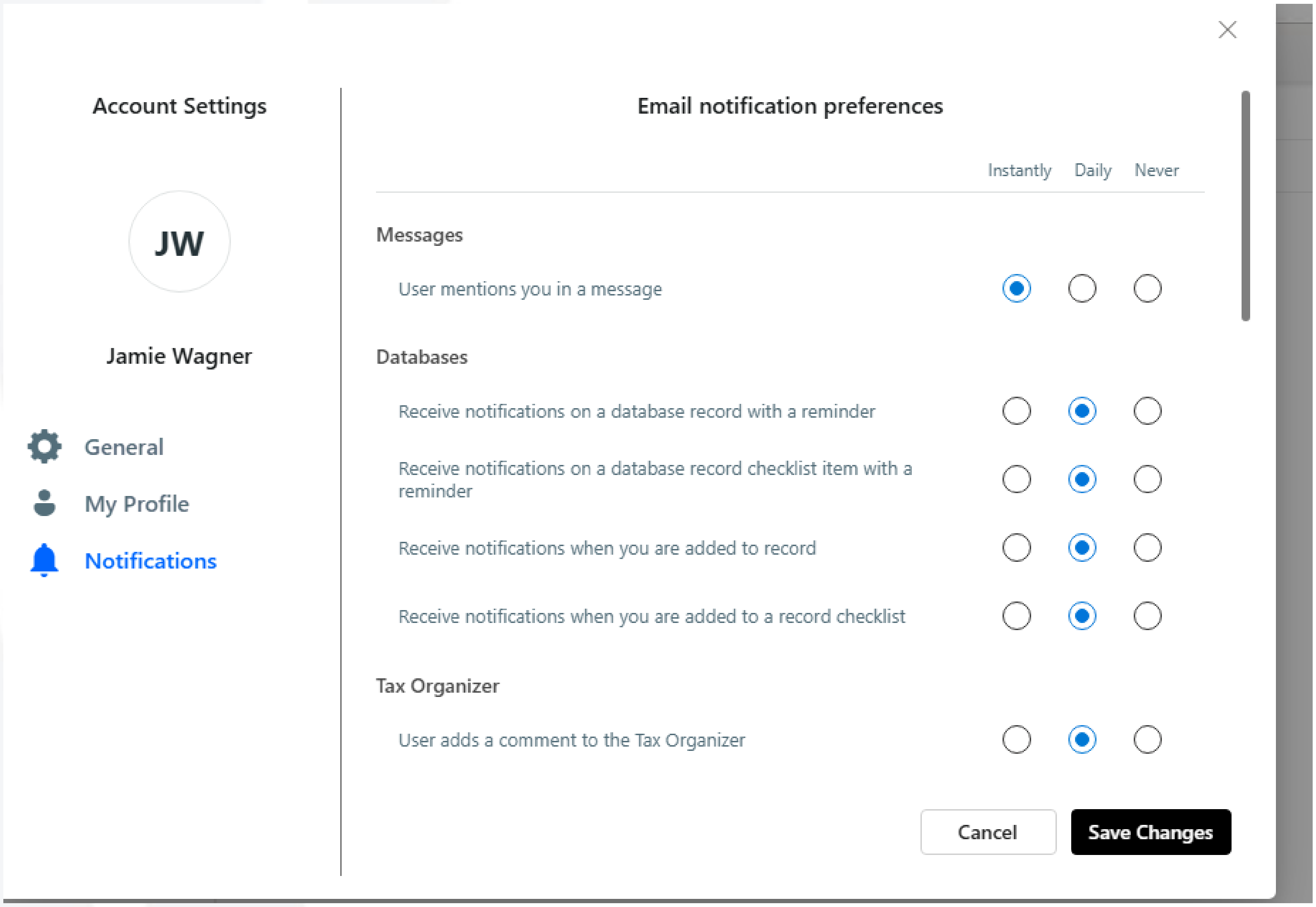
Customize which types of notifications you receive based on categories (Messages, Databases, Tax Organizer).




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

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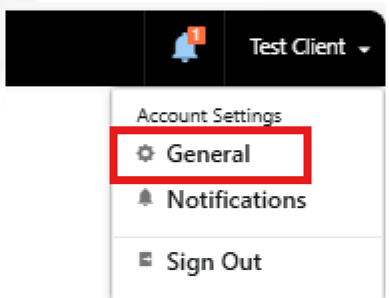
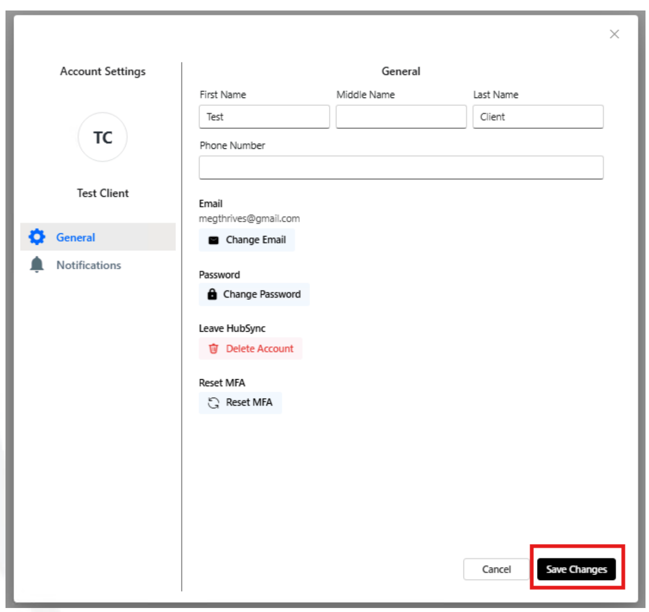
## Manage Your User Settings

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 pinion

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