



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.

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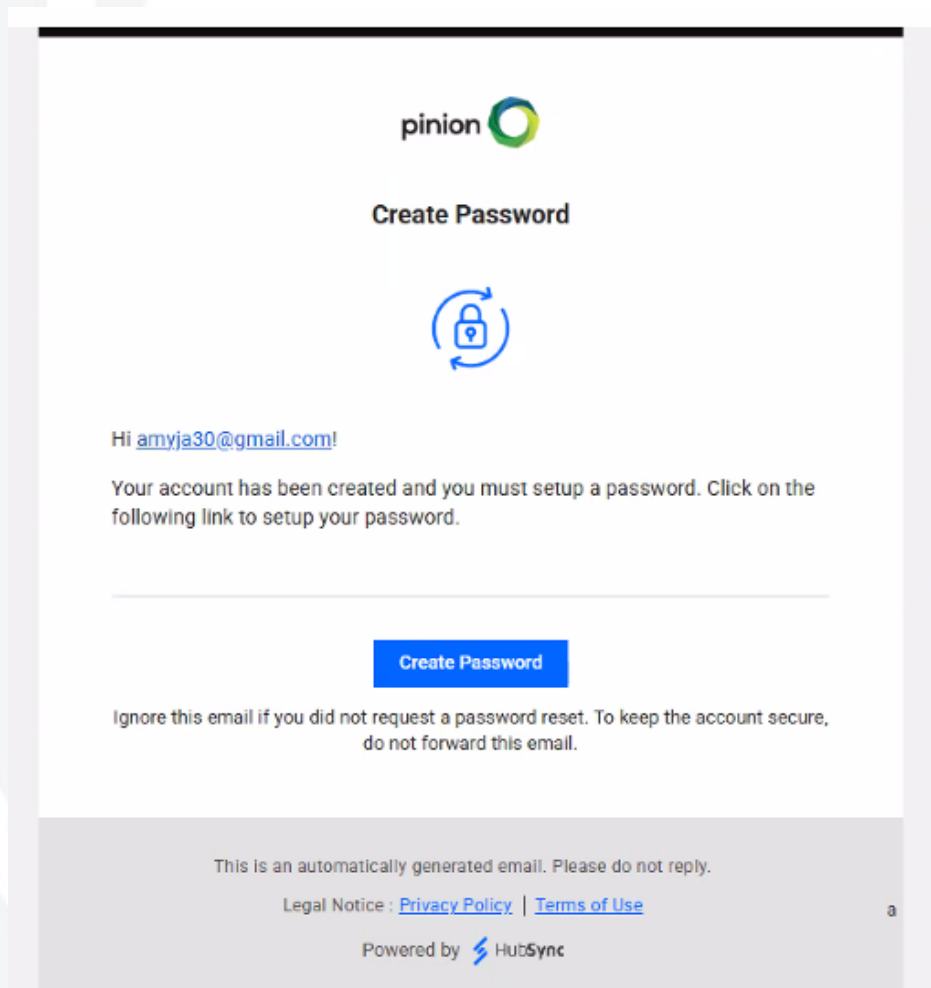
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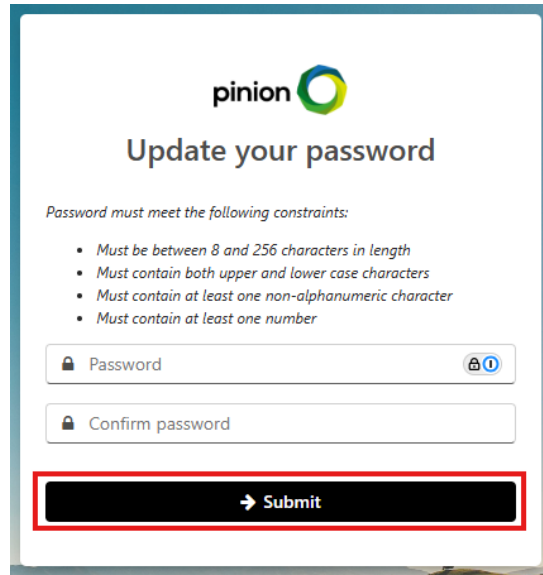
How to Sign Up

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.



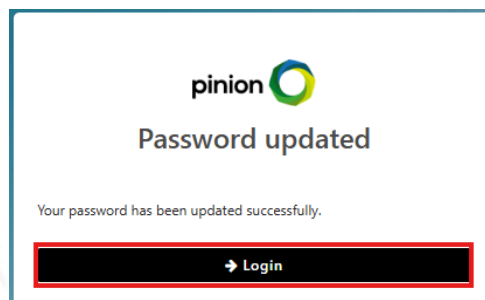
Step 2: Create Password - To finish creating your account, enter a password that meets all the requirements listed. When complete, click "**Submit**".

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



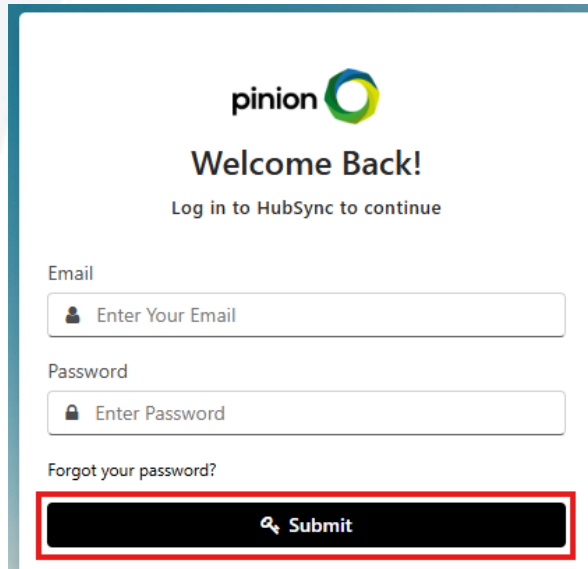
The screenshot shows a web form titled "Update your password" with the Pinion logo at the top. Below the title, it states "Password must meet the following constraints:" followed by a bulleted list: "Must be between 8 and 256 characters in length", "Must contain both upper and lower case characters", "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 on the right. At the bottom, a black button with a white right-pointing arrow and the text "Submit" is highlighted with a red rectangular 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**".



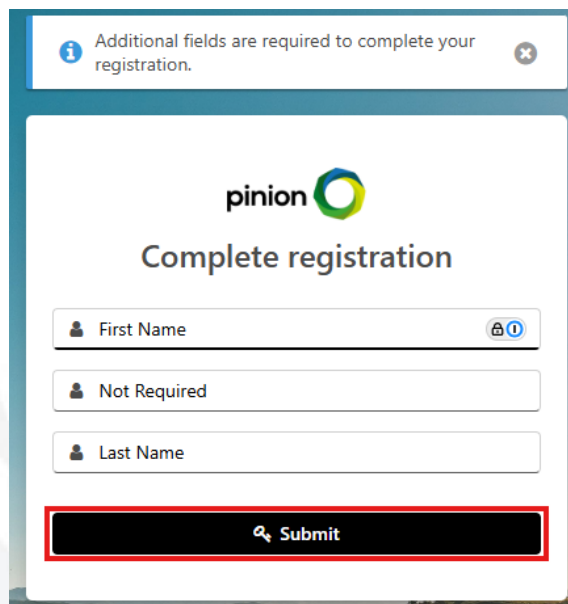
The screenshot shows a confirmation screen titled "Password updated" with the Pinion logo at the top. Below the title, it says "Your password has been updated successfully." At the bottom, a black button with a white right-pointing arrow and the text "Login" is highlighted with a red rectangular border.

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



The image shows a login form titled "Welcome Back!" with the subtitle "Log in to HubSync to continue". It features the Pinion logo at the top. Below the title 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 registration form titled "Complete registration" with the Pinion logo. At the top, a message box states "Additional fields are required to complete your registration." Below the title are three input fields: "First Name" (with a lock icon), "Not Required", and "Last Name". 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' screen with the 'SMS' method selected. It includes fields for 'Country Code' (set to '+1 United States') and 'Mobile phone'. A 'Send a one-time code' button is visible. Below, there is a 'Verification code' field and an 'Enable' button highlighted with a red box.

The second screenshot shows the 'Enable two-factor' screen with a list of 10 recovery codes displayed in a grid. The codes are: K1W3B-BGMBK, J2PNG-VMSS, 8D5VC-49Q5L, 75FPR-ZHVQR, B7X3N-YGDTJ, Y63RJ-KJ657, 5Y4NK-6T63Y, VFMQT-QRMJB, CCN4J-R3VMX, and 6J9QV-JQ9GL. Below the codes is a 'Done' button highlighted with a red box.

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. It includes a date '1 Jan, 2025' in the top right corner. The main text states: '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"):'.

There are two numbered sections of terms and conditions. The first section discusses content submission and data protection. The second section discusses ownership of the Services and content.

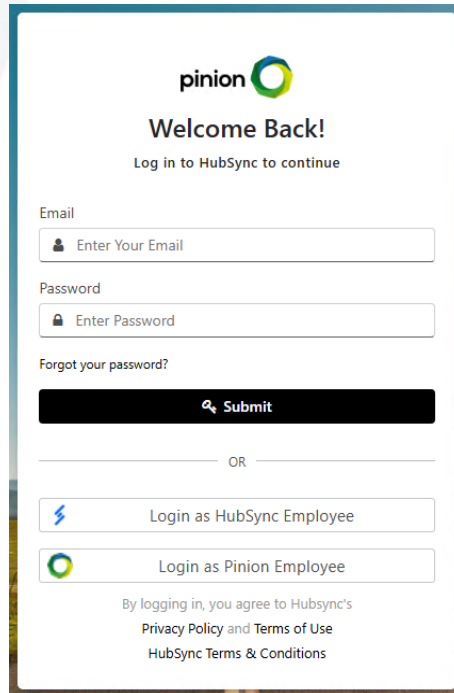
At the bottom, there are two buttons: 'Decline' and 'Accept'. The 'Accept' button is highlighted with a red box.

How to Log in to HubSync

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

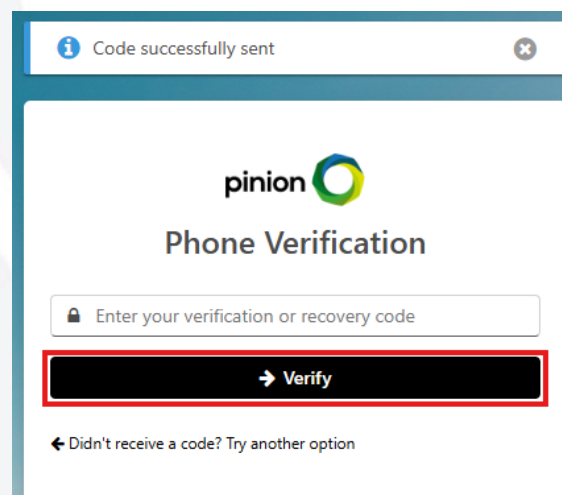
Logging In

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

The image shows the HubSync login page. 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". There is a link "Forgot your password?" and a "Submit" button. Below these is an "OR" separator. Underneath are two buttons: "Login as HubSync Employee" and "Login as Pinion Employee". At the bottom, there is a disclaimer: "By logging in, you agree to Hubsync's Privacy Policy and Terms of Use HubSync Terms & Conditions".

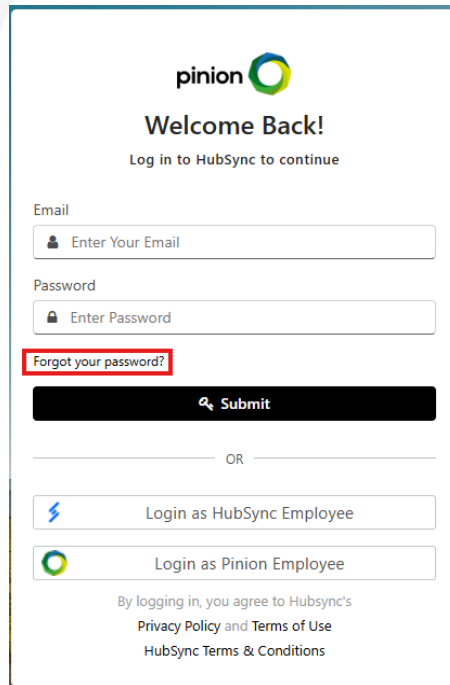
Verification Code Process

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 image shows the HubSync phone verification page. At the top, there is a notification bar that says "Code successfully sent". Below this is the Pinion logo and the text "Phone Verification". There is an input field with a placeholder "Enter your verification or recovery code". Below the input field is a "Verify" button, which is highlighted with a red border. At the bottom, there is a link "Didn't receive a code? Try another option".

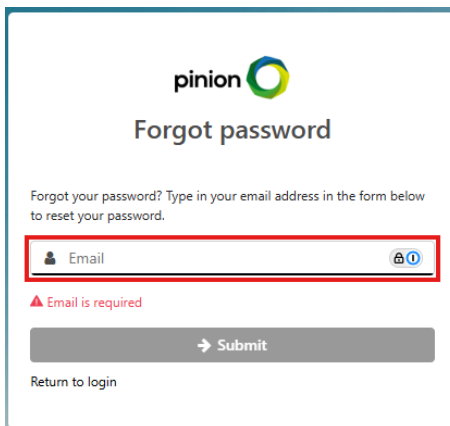
Resetting Your Password

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



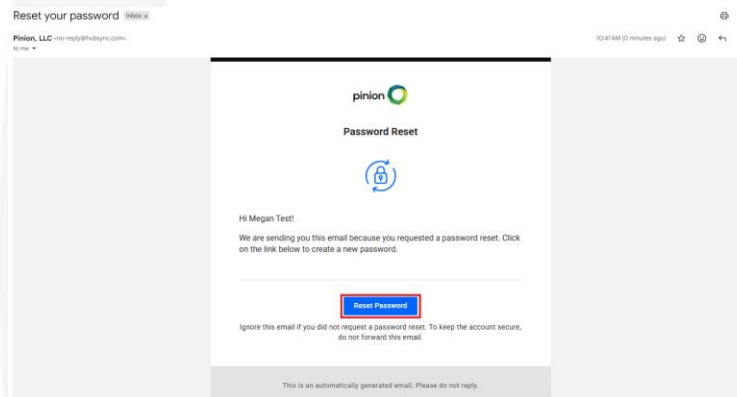
The image shows the Pinion login interface. At the top is the Pinion logo and the text "Welcome Back! Log in to HubSync to continue". Below this are two input fields: "Email" with a placeholder "Enter Your Email" and "Password" with a placeholder "Enter Password". A red box highlights the link "Forgot your password?". Below the fields 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. It features the Pinion logo and the heading "Forgot password". Below the heading 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 field is a red error message: "Email is required". A grey "Submit" button is positioned below the error message. At the bottom left, there 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.



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

Code successfully sent

pinion

Phone Verification

Enter your verification or recovery code

→ Verify

← Didn't receive a code? Try another option

You will be logged in after you complete this request.

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

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.

Go to Workspace

A workspace is the central hub for each entity or individual served by Pinion. Click the button below to see the list of workspaces. From there, you can access projects, manage documents, collaborate with your Pinion team, respond to requests, upload files, complete organizers, and review and sign documents, including tax returns.

Open Workspaces table

My Recent Workspaces

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

Recent Workspaces		
WORKSPACE	LAST MODIFIED BY	MODIFIED DATE
 Client ABC	Margaret Kr...	07/23/2026 9:...
 PBC UAT - Test Entity #1	Ed Doris	07/16/2026 2:...

My Recent Files

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

My Recent Files			
All workspaces			
FILE NAME	WORKSPACE	LAST MODIFIED BY	MODIFIED DATE
 HubSync-Client-User-Guide-Pinion-Jan-2026...	Client ABC	Margaret Test	07/22/2026 11:32 AM

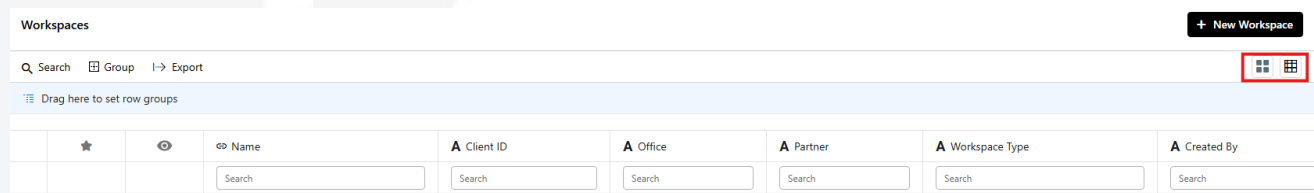
Navigate Back to the Gateway

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.

  Margaret Test ▾

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.



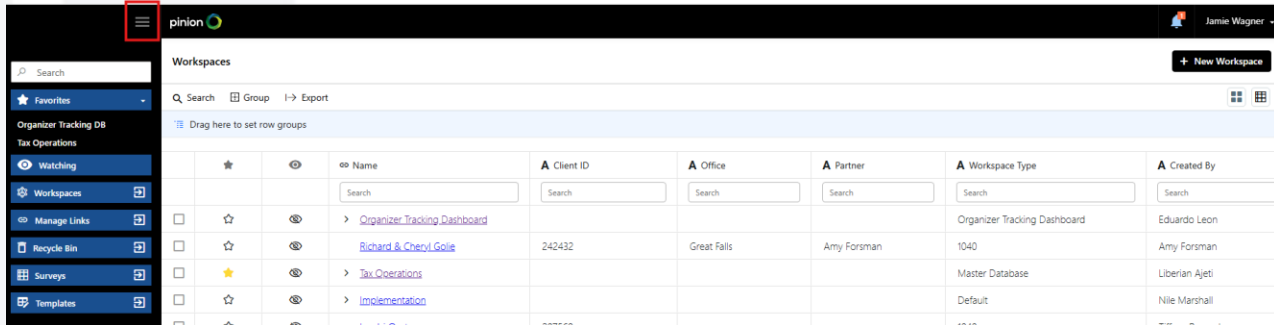
Managing Your Workspace

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.

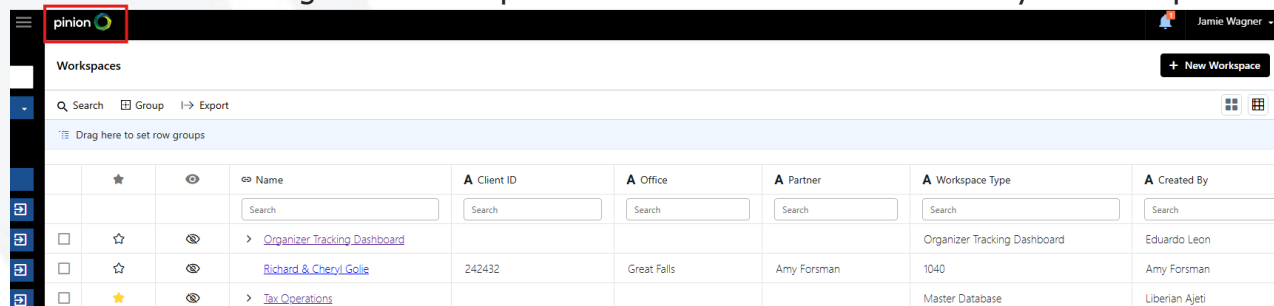
Navigating Between Multiple Workspaces

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

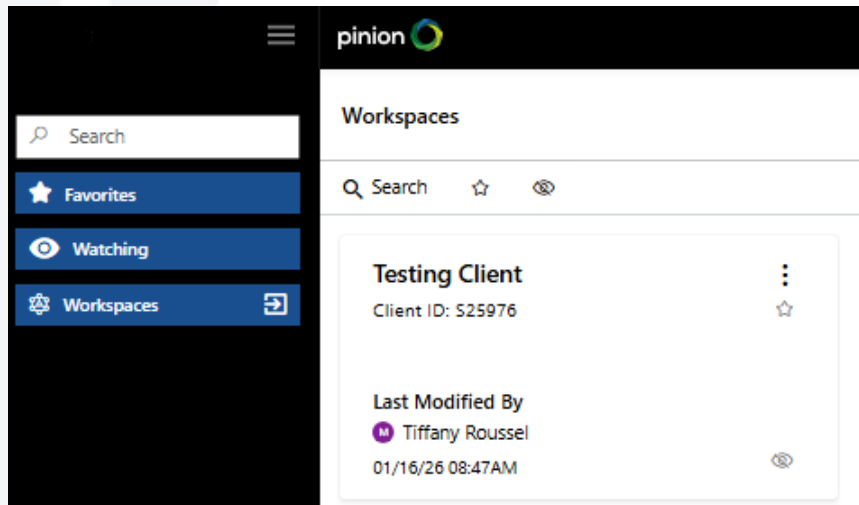
Click on the Pinion logo near the top left side of the screen to return to your workspaces.



Workspace

Navigating your Workspace

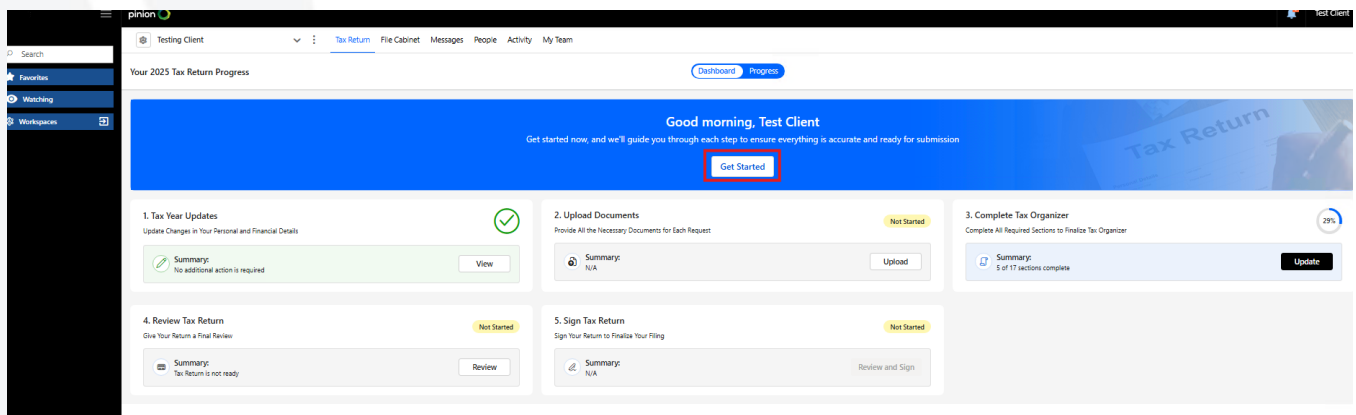
Your workspace will be displayed as the one shown below if in Tile Mode:



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 tax organizer. At the top, there's 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 list of 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 navigation bar of the HubSync tax organizer. It contains three buttons: 'Print', 'Submit to Tax Preparer', and 'Next'. The 'Next' button is highlighted with a red rectangular box.

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.

The screenshot displays the Pinion Tax Document Upload Portal. The top navigation bar includes 'Testing Client', 'Tax Return', 'File Cabinet', 'Messages', 'People', 'Activity', and 'My Team'. A progress bar shows five steps: 1. Tax Year Updates, 2. Upload Documents (active), 3. Complete Tax Organizer, 4. Review Tax Return, and 5. Sign Tax Return. The main section is titled 'Tax Document Upload Portal' with the subtitle 'Upload your tax documents securely'. On the left, a 'Document Checklist' shows '0 of 25 Documents checked' and a list of documents including 'W-2 COUNTY OF DOUGLAS KANSAS' and several '1099-R' and '1099-INT' forms, each with a 'Pending' status and a trash can icon. On the right, the 'Upload Documents' section features a large dashed box for file uploads with the text 'Drag and drop files, folders, or click to browse' and a 'Browse Files' button. Below this, a list of 'Uploaded Documents (1)' includes 'Additional Notes.pdf'. At the bottom right, a 'Next' button 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"**.

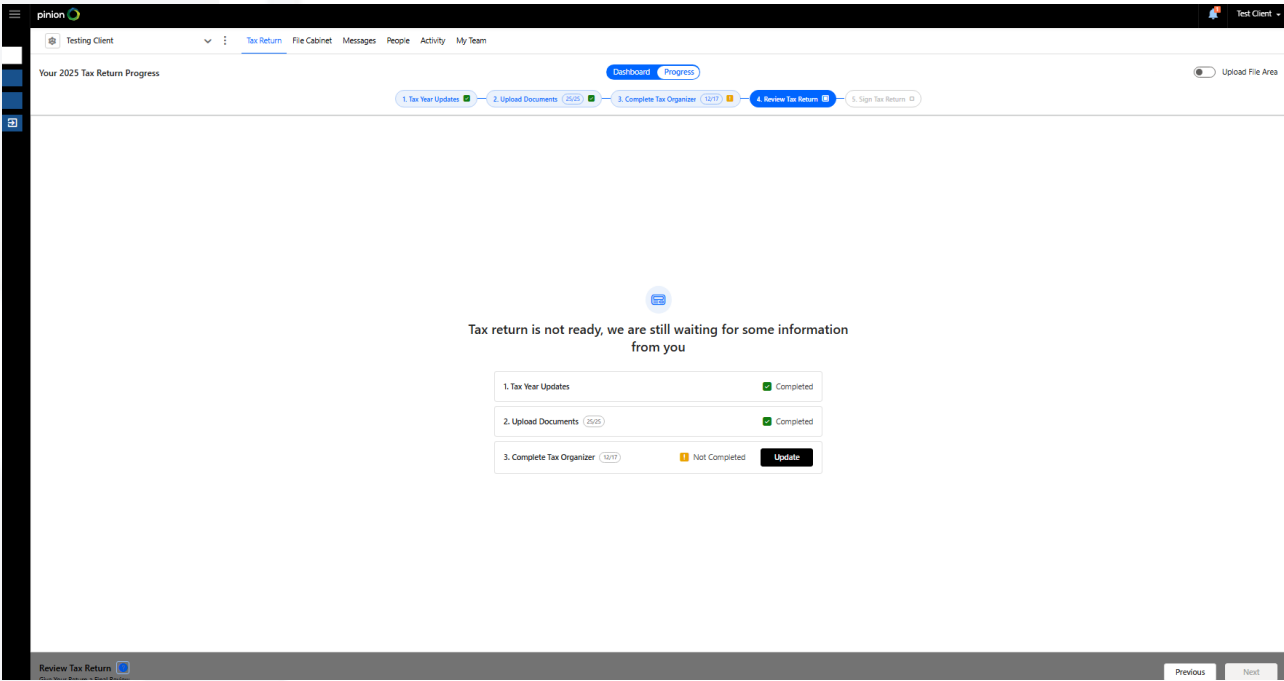
The screenshot displays the Pinion Tax Organizer interface. On the left, a navigation pane shows the progress of various sections: Personal Information (4/4), Income (6/4), Deductions & Credits (9/5), Other Taxes, Tax Payments (1/2), Household Employment Taxes, and Travel Calendar. The 'Personal Information' section is highlighted with a red box. The main area is titled 'Tax Organizer' and 'Personal Information / Taxpayer'. It contains several form fields: 'What's your marital status on December 31?' (Married), 'What's your filing status on December 31?' (Married filing jointly), 'First Name' (Test), 'Initial' (T), 'Last Name' (Client), 'Occupation' (Student), 'SSN/Tax ID number', 'IP PIN', 'Date of Birth' (01/01/2001), 'Date of Death (Optional)', 'ID Type' (Driver's license (Default)), 'Driver's license number', 'Expiration Date', 'Issue Date', and 'State / Province'. A 'Submit to Tax Preparer' button is located in the top right corner, and a 'Next' button is in the bottom right corner. Both are highlighted with red boxes. The bottom of the screen shows a 'Complete Tax Organizer' button and a 'Print' button.

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.

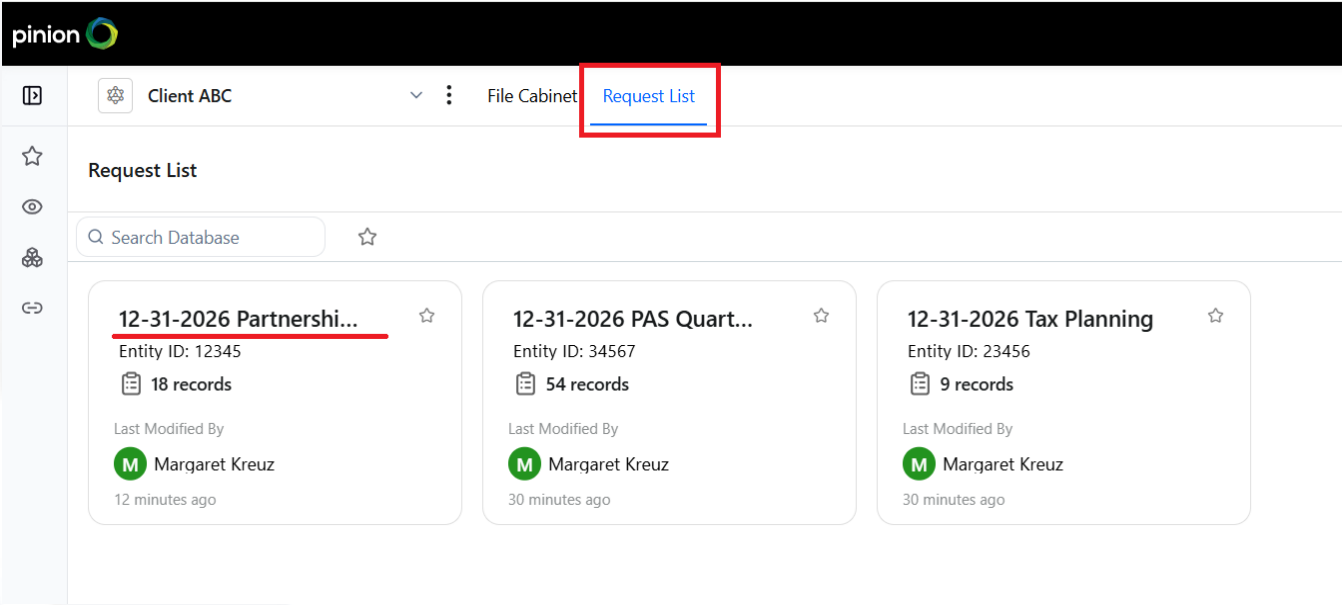
For this tax season we will not be using HubSync to deliver your tax return, if you receive your return electronically, we will continue to use SafeSend through this season.



Working Within the Request List

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

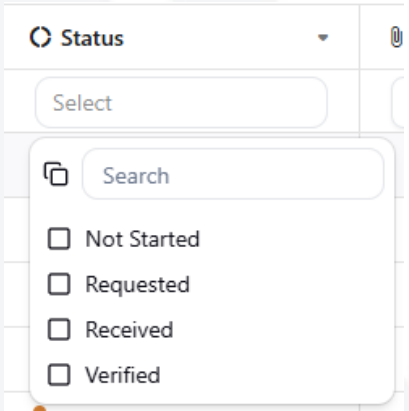
- **Request List:** This is a list of Items that are needed by Pinion to perform the requested work. From here, you can see your different projects.



- **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).



Client Assignment: Assign requests to specific team members.

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

Client Assignment

Search

Margaret Test

Select values

Search

M

 Margaret Test

✓

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.

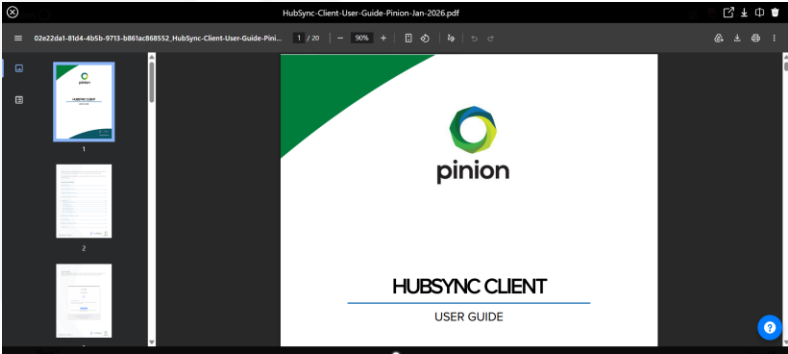
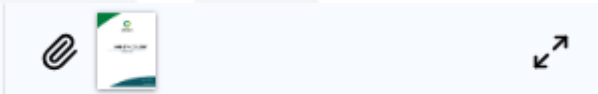
Due Date ↑ 1
Search
07/24/2026
07/24/2026
07/31/2026
07/31/2026

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.

Attachment

Add attachment(s)

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



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 ...

🔍 A Name	🔄 Status	📎 Attachment ↑ 1	👤 Client Assignment
year-	Select	Search	Search
Year-end trial balance (excel)	Requested		M Margaret Test
Year-end comparative profit & loss	Requested		M Margaret Test
Year-end comparative balance sheet	Received		M Margaret Test
Year-end general ledger (excel)	Requested		M Margaret Test

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



Sort by

Due Date

Asc Desc

then by

Name

Asc Desc

+ Add Field to Sort By

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.

← Insert Left

📌 Pin Column

Autosize This Column

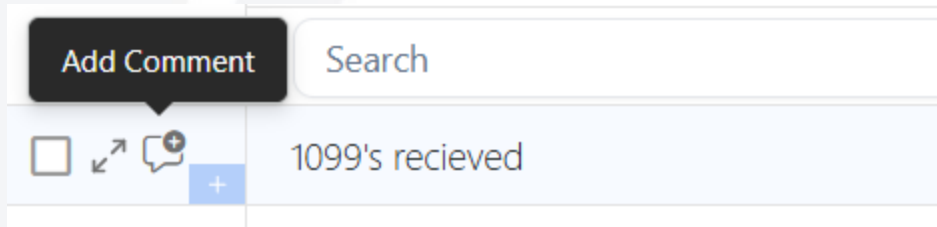
Autosize All Columns

Pin Left

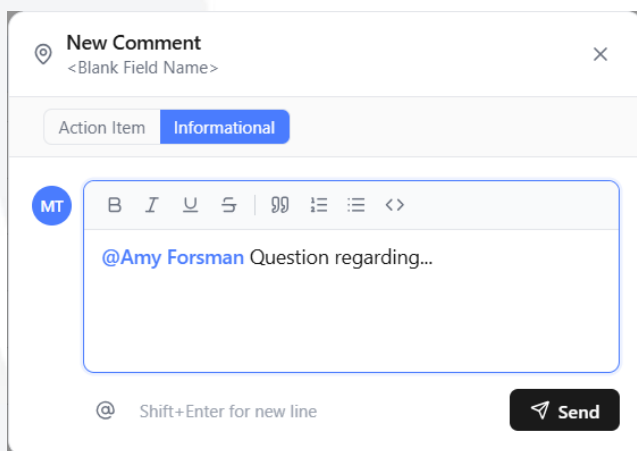
Pin Right

✓ No Pin

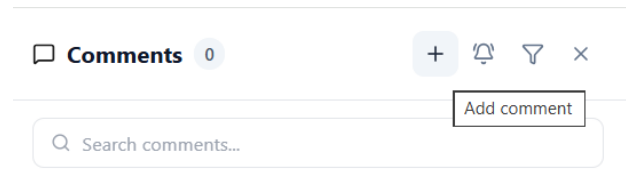
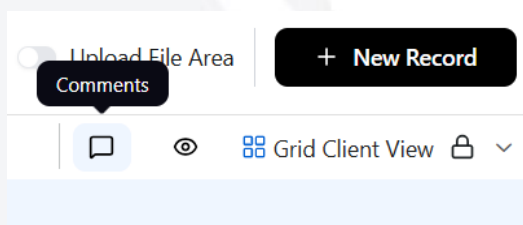
Messages/Comments on a Request Item: Communicate about specific requests directly within the item. To message and comment at the record level, hover over the right-hand side of the request item and click on the comment box.



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.



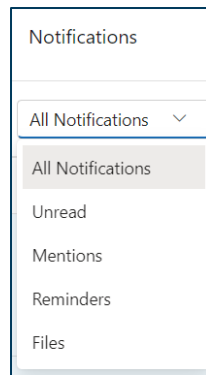
Notifications

Viewing Notifications

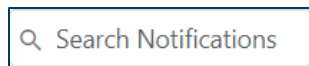
From the dashboard, you can see new notifications on any of your items or tasks if there is a red number on the top of the "bell" icon on the top-right corner of the screen.



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.

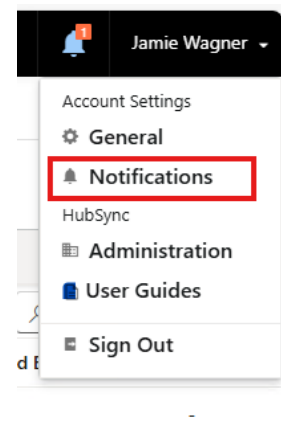


Email Notifications Preferences

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

JW

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

☐

☒

☐

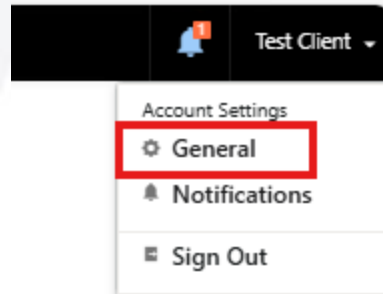
Cancel

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.

A screenshot of the "Account Settings" dialog box, specifically the "General" tab. The left sidebar shows "General" selected. The main area contains fields for "First Name" (Test), "Middle Name", "Last Name" (Client), "Phone Number", "Email" (megthrives@gmail.com), and "Password". Below these are links for "Change Email", "Change Password", "Delete Account", and "Reset MFA". At the bottom right, there are "Cancel" and "Save Changes" buttons, with "Save Changes" highlighted by a red box.

Contact Us

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



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