HUBSYNC WORKSPACE

CLIENT USER GUIDE

Keiter | HubSync

Visit our Client Center to access other client resources.

HubSync's workspace is designed to improve collaboration with your engagement team. Key features of the new HubSync platform include:

- Effortless file sharing using drag and drop or an upload link.
- Automatic reminders when documents are due.
- Organized task tracking system that allows you to filter outstanding requests.
- Customizable workspace views.
- Integrated messaging platform to communicate with your engagement team.

Use this guide to learn how to set up your HubSync account and access these features.

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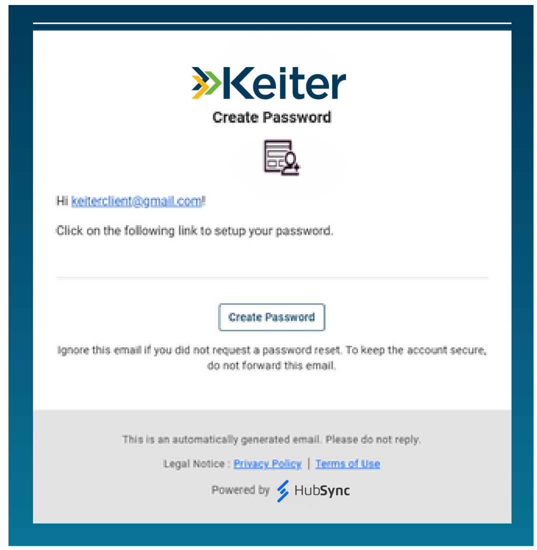
Logging in for the first time

Step 1: Accept your email invitation

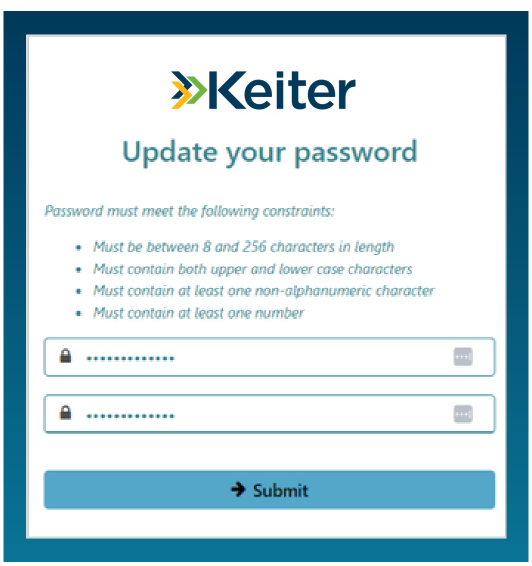
You will receive an invitation via email to access your workspace on the HubSync portal. Please follow the on-screen prompts to create your secure account.

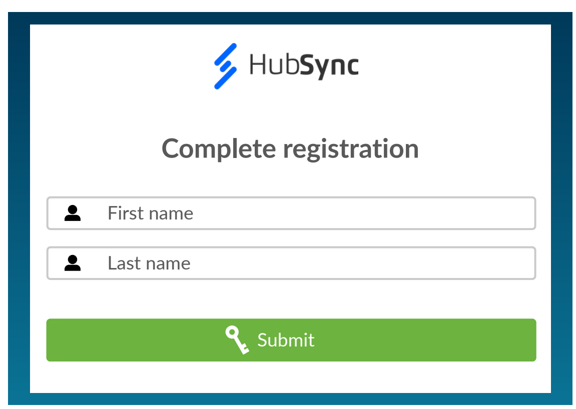
Check your spam or junk folder for an email from no-reply@hubsync.com.



Step 2: Complete registration

Create a password and enter your name.

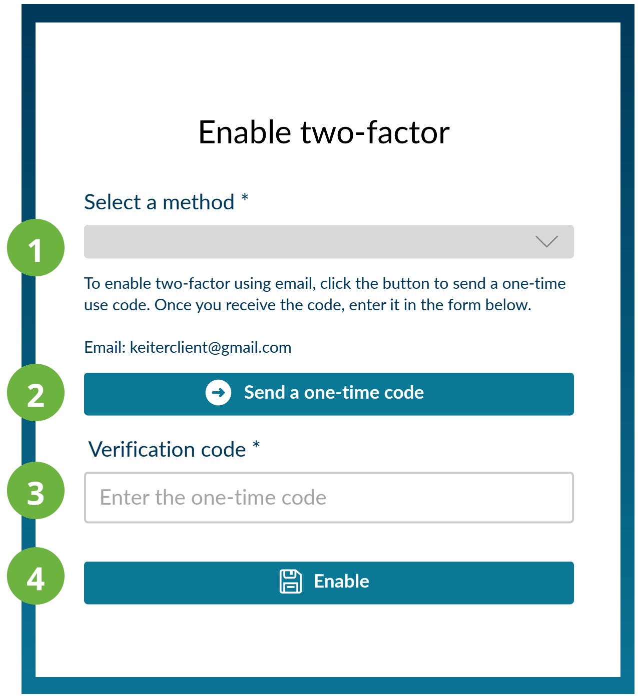




Step 3: Enable two-factor authentication

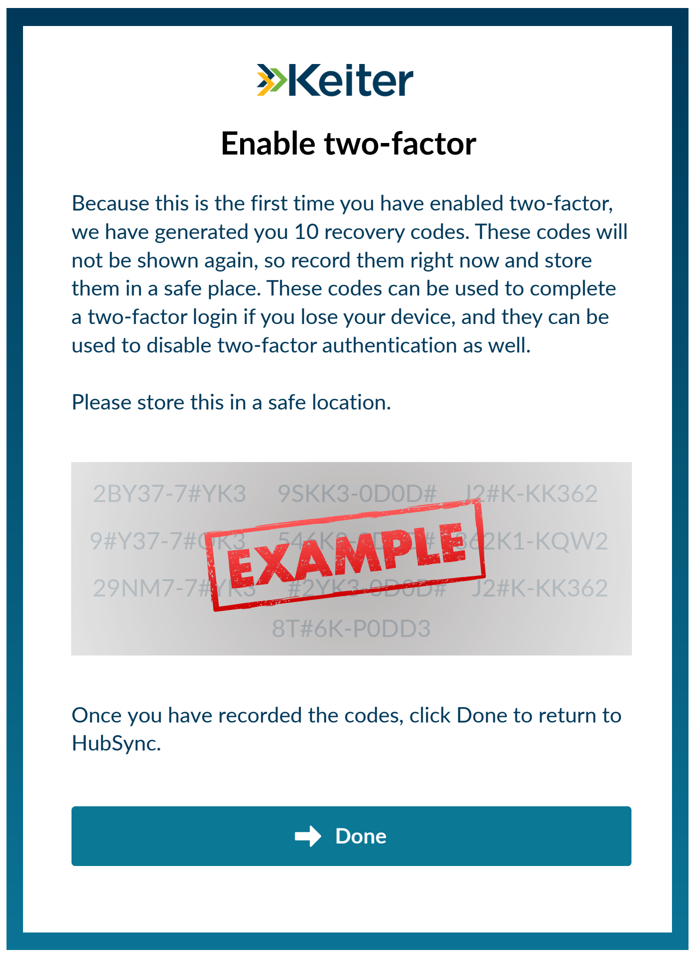
For your security, two-factor authentication must be established.

1. Select your authetication method from the drop-down menu - email or SMS.
2. Click the “Send a one time code” icon to receive a verficiation code to your selected chosen method.
3. Enter the verification code you received in the verification code text box.
4. Click the “Enable” icon.



Step 4: Recovery Codes

During your initial set up of two-factor authentication, you will be provided with ten recovery codes that can be used to complete or disable two-factor authentication.



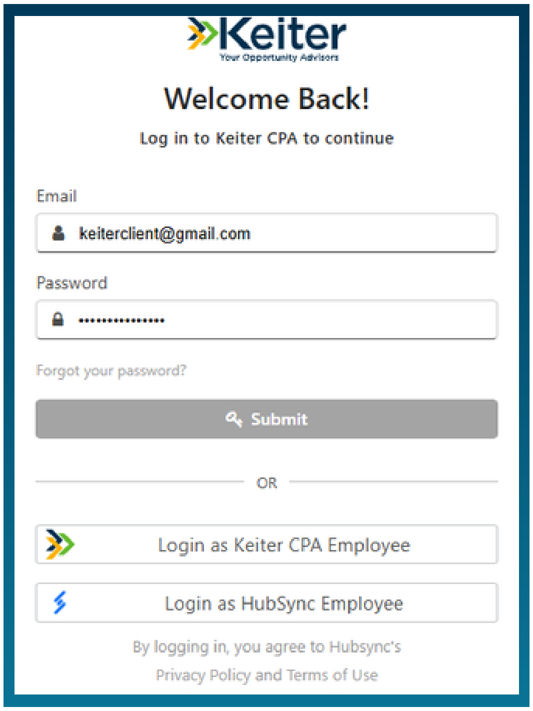
HUBSYNC
Accessing your account

Step 1: Access the HubSync Site

Visit https/keitercpa.hubsync.com/

Step 2: Enter your credentials

Your username is automatically set to your email address at which your HubSync invitation was received.

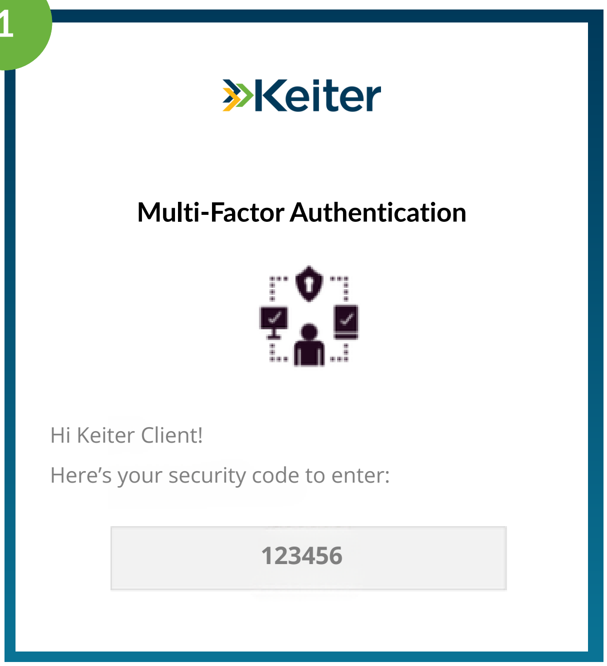


Forgot your password?

1. Select “Forgot your password” under the password text box.
2. Enter your email address in the designated box and click on the “Submit” icon.
3. Check your email for a “Reset Password” link.
4. After clicking on “Reset Password” you may be prompted to complete multi-factor authentication.
5. Create a new password that meets the required constraints.

Step 3: Complete multi-factor authentication

1



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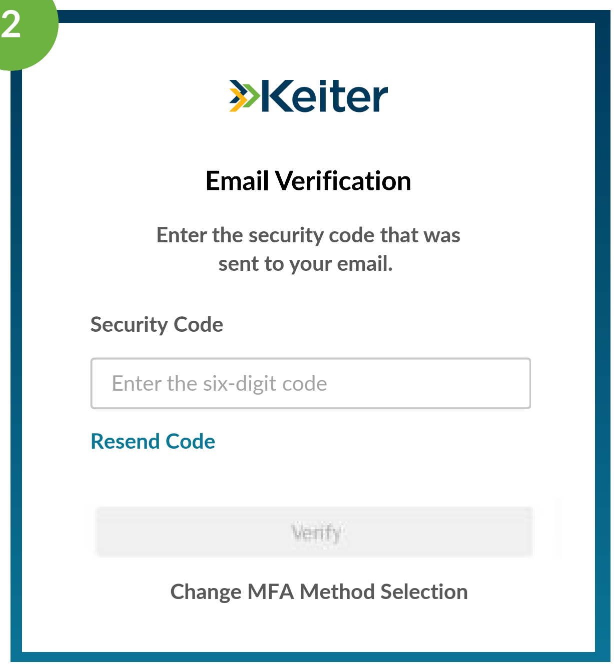
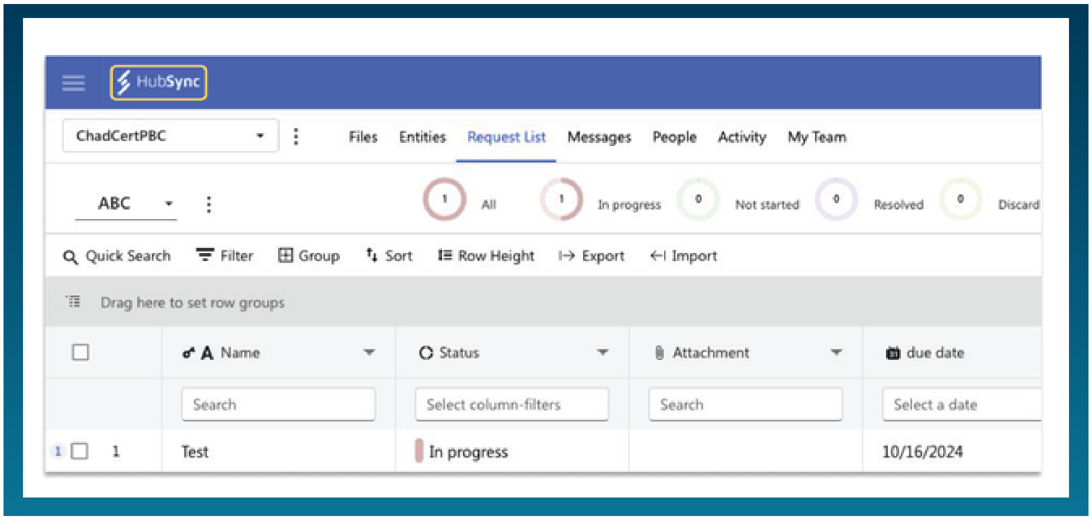


From inside a workspace, you will see the following informational tabs across the top, next to the project name:

- **Files:** Store and manage all your documents within each workspace.
- **Request List:** Track and manage requests or tasks assigned to you or your team.
- **Message:** Communicate with your team within the workspace.

Navigating between multiple workspaces

If you are associated with multiple workspaces or projects, you can easily toggle back and forth between workspaces by clicking on the "**HubSync**" icon in the top toolbar, on the left-side of the screen. Doing this will take you back to your home dashboard.



HUBSYNC
Sharing files with your engagement team

Your **Request List** consists of a list of documents that are needed by Keiter to perform agreed upon work. Within the Request List, you can view various elements of each task such as:

- Real-time status updates
- Priority levels
- Due dates

You have the ability to make notes or comments on each task, allowing for direct communication with your engagement team. You may also filter, sort and pin columns to customize the view of your data based on your preferences.

Upload requested files

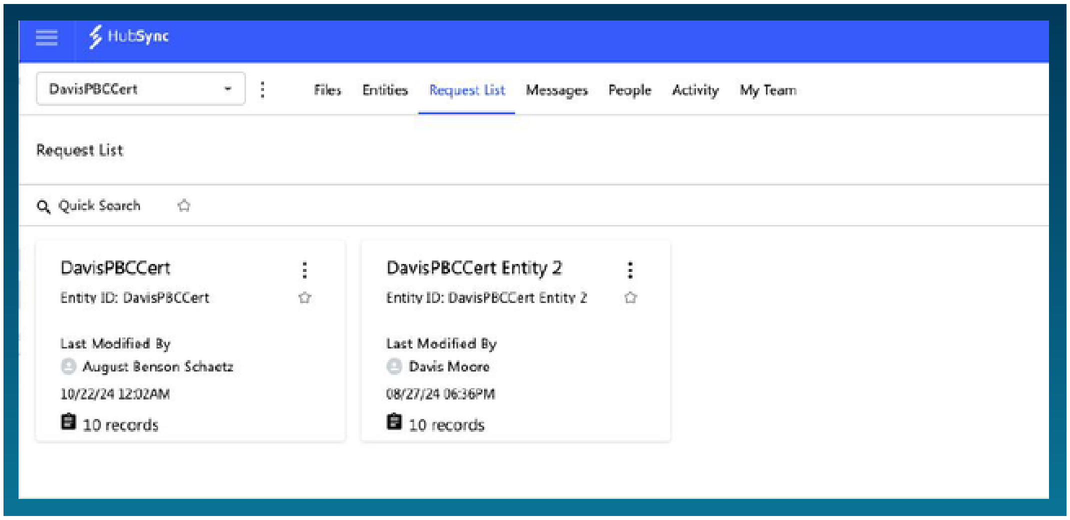
Step 1: From the File Area, view files associated with a project.

Step 2: Download files directly to the workspace, as needed.

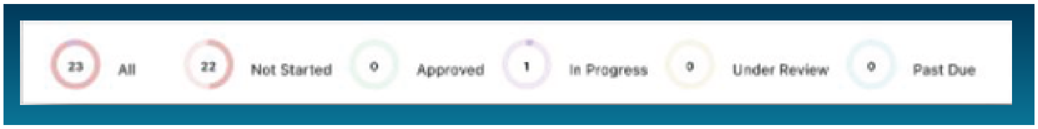
Step 3: Upload files using either the drag and drop feature or by clicking the “upload” button.

HUBSYNC
Navigating your request list

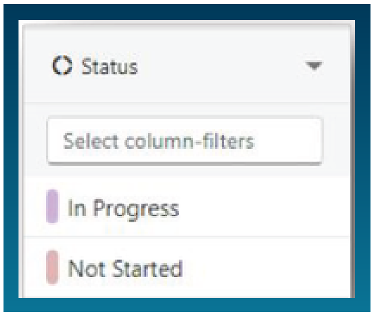
Request Items: View requested items from various projects,



Status Dashboard: This dashboard shows all the different statuses your projects may be in. Click on a status to view all items that are in that specific status.

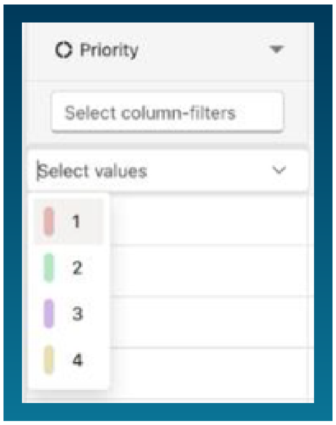


Status: From the Status column, view the current status of each request (e.g., not started, in progress, completed).



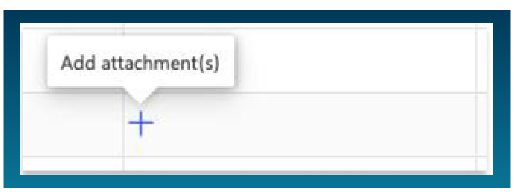
Your status will **automatically** be moved from 'Not Started' to 'In Progress' when an attachment is uploaded for that line item.

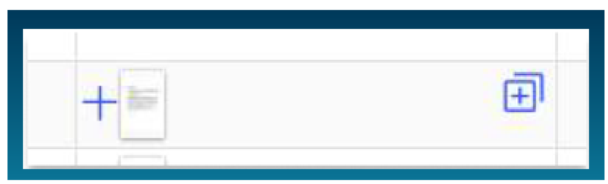
Priority: Review the document priority levels assigned by your engagement team to help you manage document uploads and keep your projects moving forward.



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

Add Attachment(s): Attach relevant files to requests for easy access. To upload a document either drag and drop directly into the cell/grid or select the '+' button the cell. All file types can may be uploaded as attachments such as .PDF, .JPEG, XLS, .DOC.

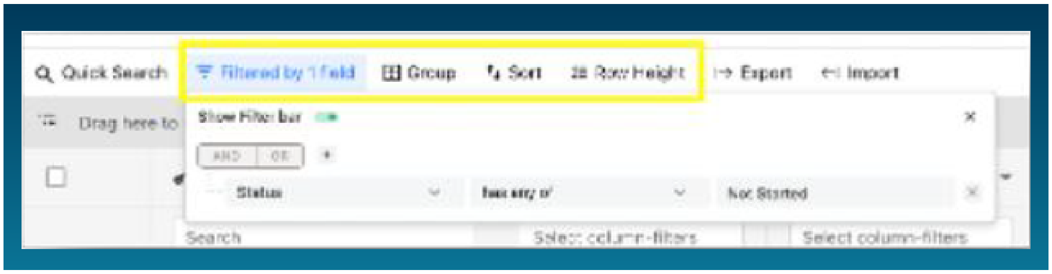




Preview uploaded documents by clicking on the image that appears in the attachment column.

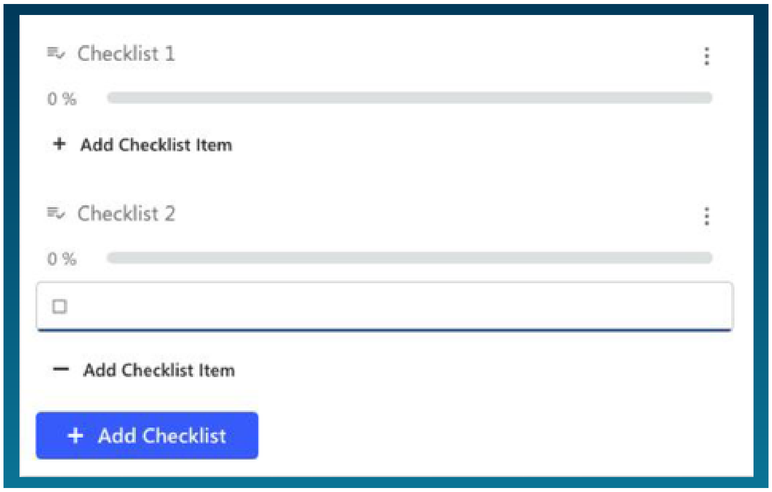
Assigned To: You can assign requests to other team members who have access to your organization's workspace.

Group/Filter/Sort: 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 change the view of your data.



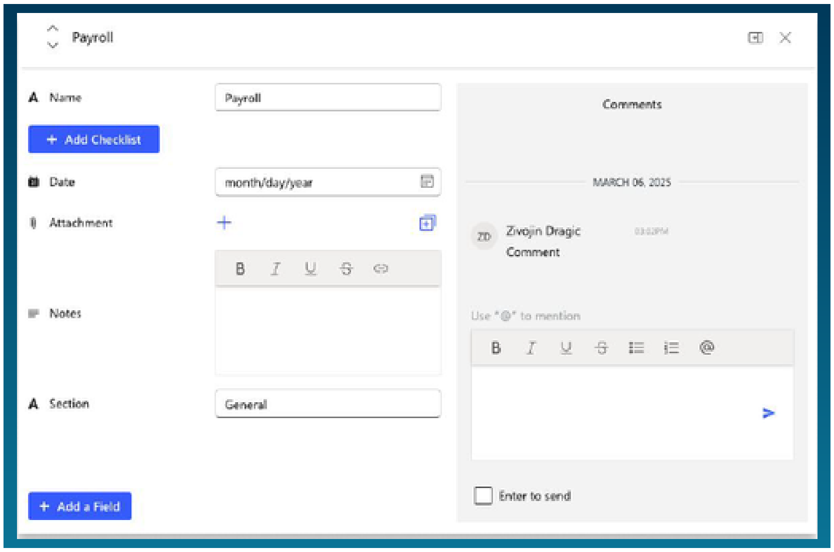
Pinning Columns: Use the drop down menu on a column header to access the pin options.

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

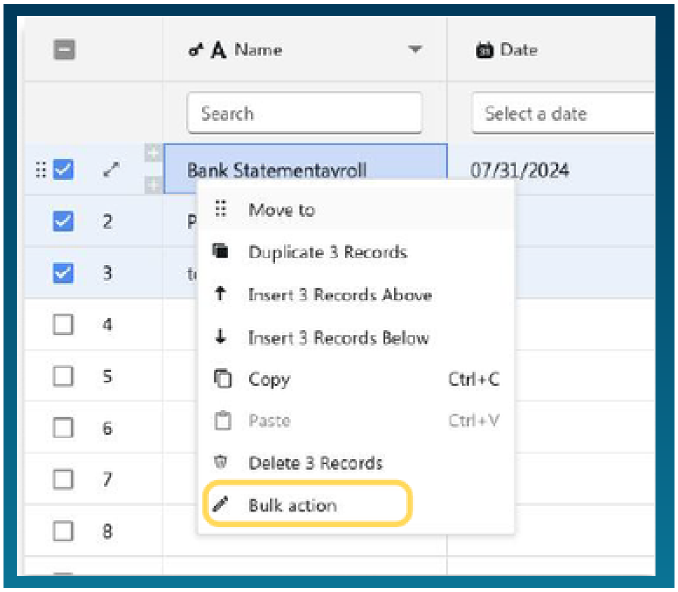


Users can add multiple checklists on each record. Each checklist can have a due date and assigned person. When a checklist item is marked off or completed, the progress bar is updated and item is struck through.

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



Bulk Actions: To update multiple rows at once, select desired rows on the left, and right click anywhere in the grid and select "Bulk Actions". Next, select the column to perform the bulk action on, and the value that records should be updated to.

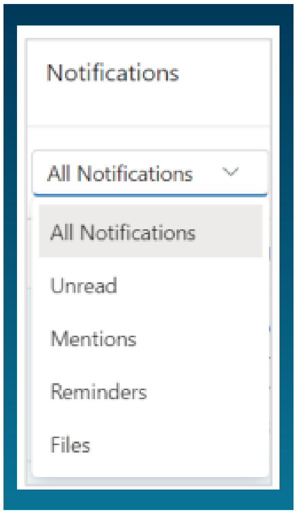


HUBSYNC
Managing notifications and reminders

How to View Notifications

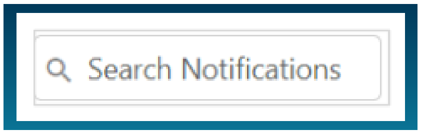
From the dashboard, you can see if there are notifications on any of your items or tasks if there is a red number on the top of the "bell" icon on the top-right corner of the screen.

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



Search Notifications

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



HUBSYNC

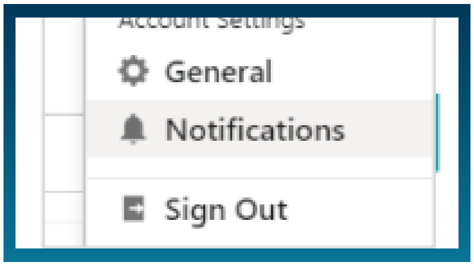
Manage email notification preferences

Set Email Notifications Preferences

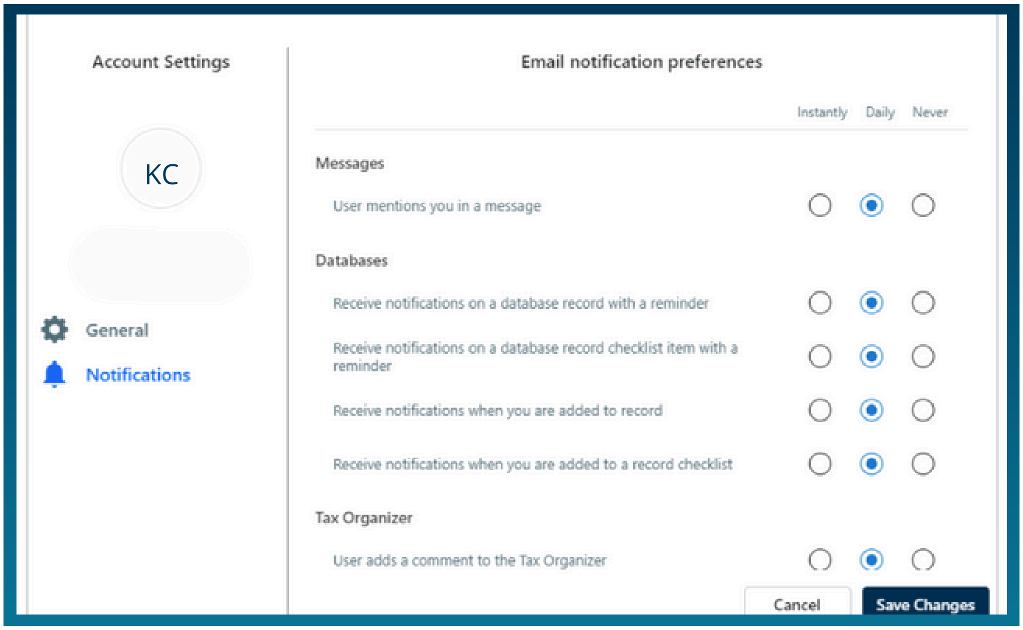
In the top right corner, next to your name, click on the drop-down arrow and select Notifications to update your email notification preferences. Choose from the following options:

- Instantly – Receive notifications as soon as they occur.
- Daily – Receive a daily summary of notifications.
- Never – Turn off notifications.

Once complete, click "Save Changes."



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



HUBSYNC
Manage User Settings

User settings can be adjusted by clicking on username and then selecting “General”.

The following items can be modified:

1. Name Update: Update your name in the system.
2. Update Email Address: Change your email address associated with your account.
3. Change Password: Update your password for security.
4. Reset MFA: Reset your multi-factor authentication settings.