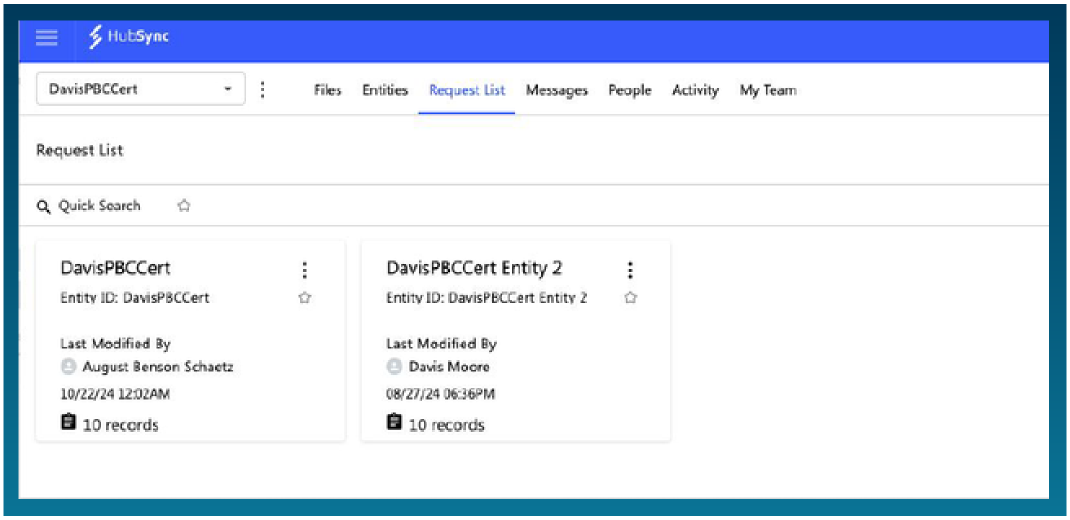
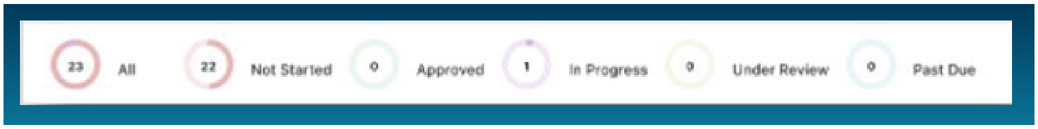
# HUBSYNC
## Navigating your request list

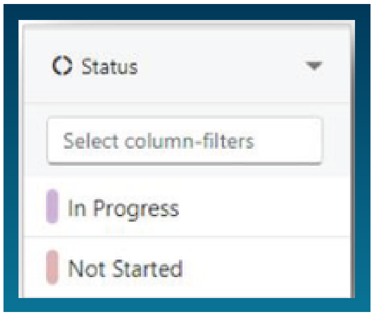
**Request Items:** View requested items from various projects,




**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.

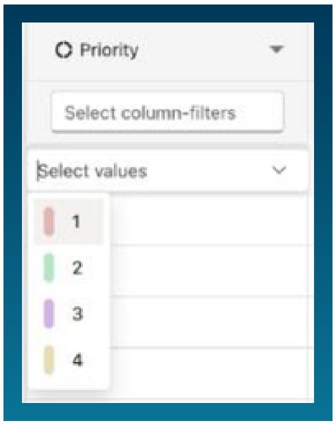



**Status:** From the Status column, view the current status of each request (e.g., not started, in progress, completed).



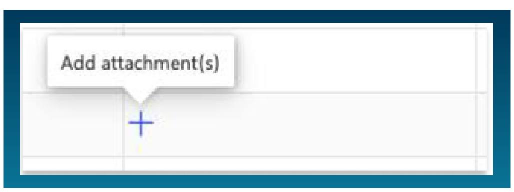

Your status will **automatically** be moved from 'Not Started' to 'In Progress' when an attachment is uploaded for that line item.

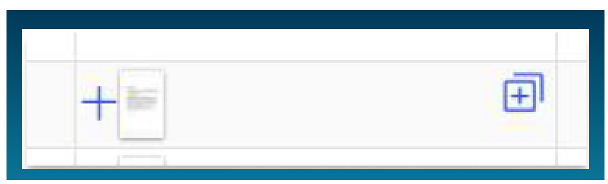
**Priority:** Review the document priority levels assigned by your engagement team to help you manage document uploads and keep your projects moving forward.




**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.

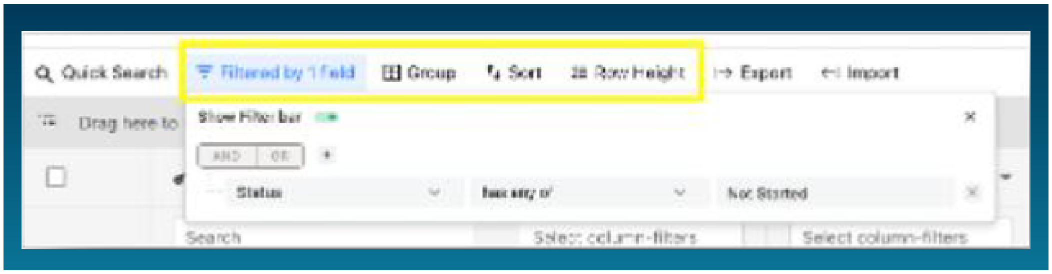


Preview uploaded documents by clicking on the image that appears in the attachment column.

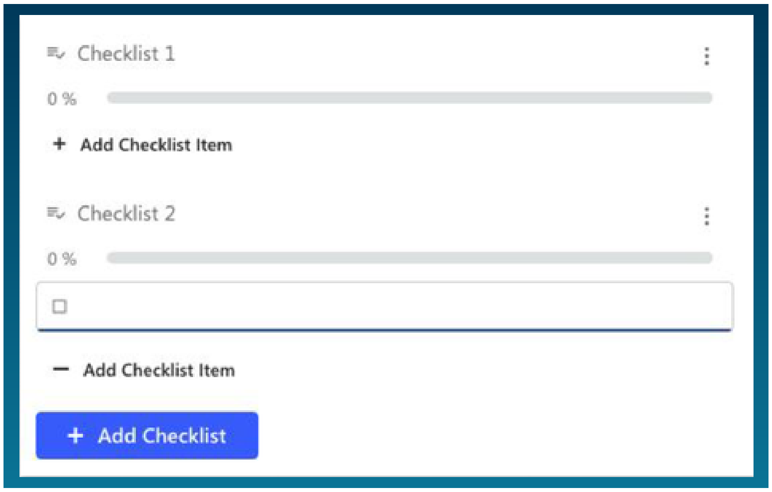
**Assigned To:** You can assign requests to other team members who have access to your organization's workspace.

**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.



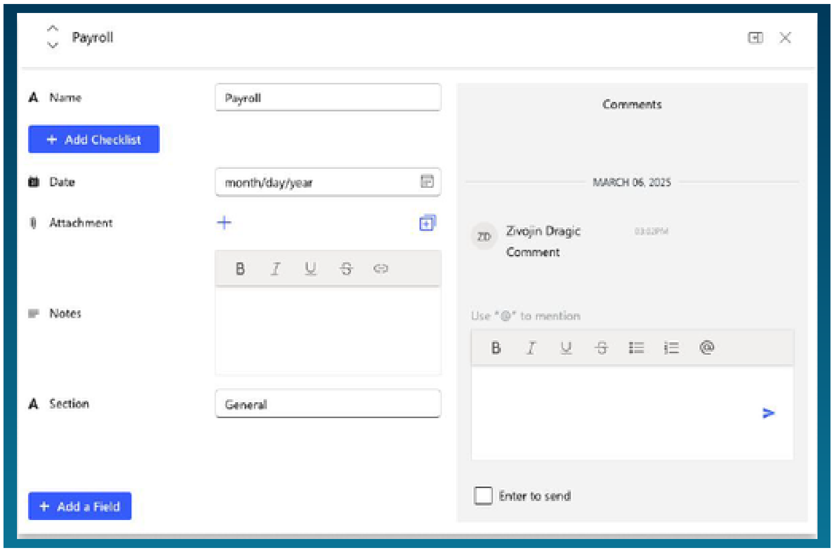

**Pinning Columns:** Use the drop down menu on a column header to access the pin options.


**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.

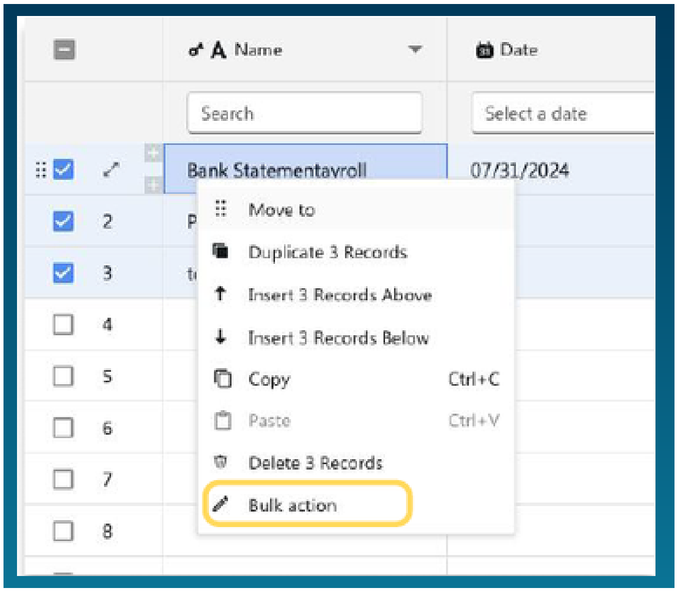



Users can add multiple checklists on each record. Each checklist can have a due date and assigned person. When a checklist item is marked off or completed, the progress bar is updated and item is struck through.

**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.

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