

## Features Include:

- Firm-managed templates by engagement type
- Drag & drop file or folder uploads per request item
- Ability to assign firm or client personnel to specific requests
- Due date by request and reminder functionality
- Categorization of requests
- Ability to create multiple views for firm and client tracking
- Status graphics for easy filtering outstanding requests
- Messaging capability between the client and the firm
- Consolidation of requested files

Group	Attachment	Request Detail	Status	Due Date
1		Were there any ownership or entity agreement changes this tax year? If yes, provide documentation.	Completed	04/30/2024
2		Upload the trial balance and general ledger in excel format. When applicable the financial statements also.	In Progress	04/30/2024
3		Upload the report of functional expense or statement of activity by class.	In Progress	04/30/2024
4		Did you make any payments this tax year that would require you to file Form(s) 1099?	In Progress	04/30/2024
5		Upload detail of any unique property activity.	In Progress	04/30/2024
Income Statement (7)				
Investments (4)				
Fixed Assets (5)				
Liabilities (5)				

## How does HubSync prepare the Document Request List?

Firms will create and manage various templates across tax and assurance to ensure clients receive the appropriate request lists based on the active engagement.

Firms deliver either one-by-one or in batch the appropriate template. Clients receive a link to their workspace with a new tab titled, "Request List" which is immediately available to begin collaborating across requests.

Uploaded documents and completed requests are tracked and both the client and the CPA firm have real-time visibility into the status of requests.

## Can PBC request lists be created in batch?

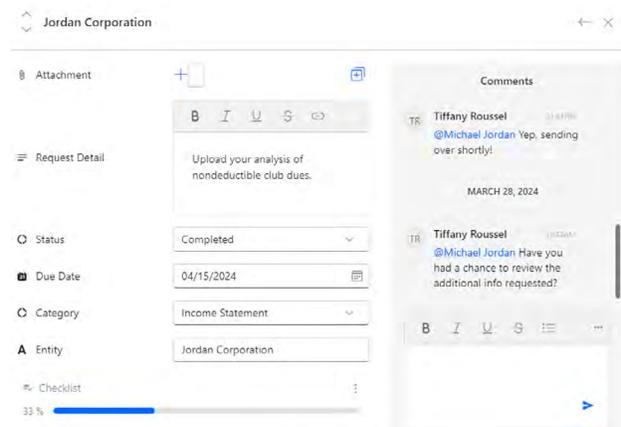
Yes, the CPA firm can choose to create PBC requests list in bulk or individually.

## How does the client join HubSync?

For new clients, upon delivery of the PBC and workspace, the client will receive a firm-branded customized email with a link to HubSync. Clients will create a password and select their preferred multi-factor authentication method (email or SMS).

## Can the firm message the client through HubSync?

There are two options for messaging with the client on PBC requests items. Via the workspace 'Message' tab, staff and the client can message back and forth for needs across any engagement. In addition, within the PBC request list, messaging related to an individual request item can occur directly on the specific request.



## Can the firm monitor the progress of all PBC request lists in the firm?

Yes, with HubSync's real-time dashboards, firms can track the status of PBC request list for all clients across a variety of metrics (e.g., by office, partner...etc.). Firms can favorite specific filters, drill into metrics, and access the underlying data.

