HubSync Workflow Tracking integrates your firms' workflow data and provides real time updates

Use HubSync's Workflow Tracking module to integrate your firm's workflow data to see real-time status of your engagements (e.g. 1040, 1120, CAS, etc.).

Our bi-directional integration allows users to make changes to workflow detail such as assignments and status and see changes refllected in the workflow tool within seconds!
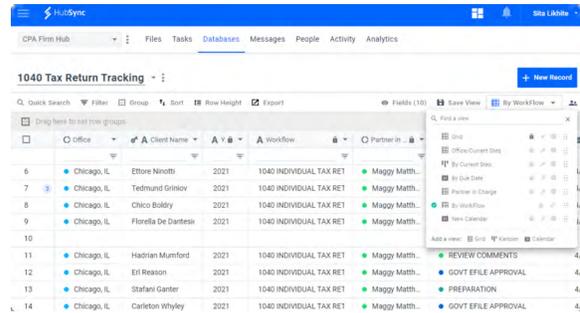
We have integration with various workflow solutions and improved upon these platforms to make it easier to track and see where the work is, especially with two API calls every hour!

- Slice and dice the information using our prroprietery "Spreadsheet as a Database" feature to get meaningful insights into the progress of tax returns

- View KPIs and get detalied drill down reporting on demand

Proprietary features include:

- Ability to make bulk updates and push them to workflow. This allows you to reduce the overnight wait for making bulk changes to PIC, informational fields, and other similar fields to just a few minutes!

- Any firm updates in HubSync are automatically synchronized back to workflow

- Update workflows one-at-a-time OR in bulk

- Bullk updates that save significant time for YE rollovers

- Substantial time savings over the current manual and timely process

- Update thousands of records - the scale is incomparable