

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 reflected in the workflow tool within seconds!

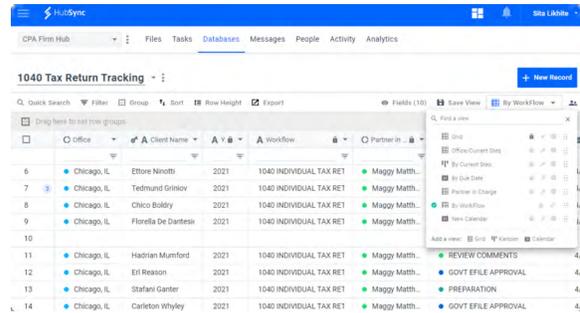
We have integration with various workflow solutions and improved upon these platforms to make it easier to track and see where the work is, especially with two API calls every hour!

The screenshot displays the HubSync Workflow Tracker interface. At the top, there are buttons for 'Reindex Documents', 'Refresh', 'Update GFR' (circled in red with a blue arrow pointing to it), and 'Admin Actions'. Below this is a table with columns for 'Last GFR Update', 'Workfl...', and 'Pic'. The table contains two rows of data. A modal window titled 'Bulk Action' is open, showing a 'MODIFY FIELD' section with a dropdown for 'Pic' and a 'SET VALUE TO' section with a dropdown for 'Ellen Mulcahy'. A blue arrow points from the 'Bulk Action' modal to the 'Update GFR' button. The modal also has 'Cancel' and 'Update' buttons.

Last GFR Update	Workfl...	Pic
10/29/2022 12:00PM	1040	Anthony Reidler (Tech)
10/29/2022 12:00PM	4868	Anthony Reidler (Tech)

FirmFlow	Files	Databases	Messages	People	
1	1253530	Air Capital Aviation	TAX RETURN	Success	10/29/2022 12:00PM
2	1266010	Checklist Supplies	TAX EXTENSION	Success	10/29/2022 12:00PM
3	1345684	Mailroom LLC			
4	1354450	TORIKOGLU, AYNUR			
5	1390447	ABDULLAH, NAIM E			
6	1390448	ABDULLAH, NAIM E			
7	1390449	ABRAMOWITZ, ADA			
8	1390450	ABRAMOWITZ, ADA			
9	1390451	ABRAMOWITZ, ADA			

- ❖ Slice and dice the information using our proprietary "Spreadsheet as a Database" feature to get meaningful insights into the progress of tax returns
- ❖ View KPIs and get detailed 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
- ❖ Bulk 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

