

## HubSync Client Portal/Document Delivery

HubSync's Client Portal provides a space to collaborate electronically with clients and **allows for file sharing and custom workspaces for each client or entity**. And our Document Delivery and Break Up capabilities turn 20 minute manual tasks into **instant automation**.

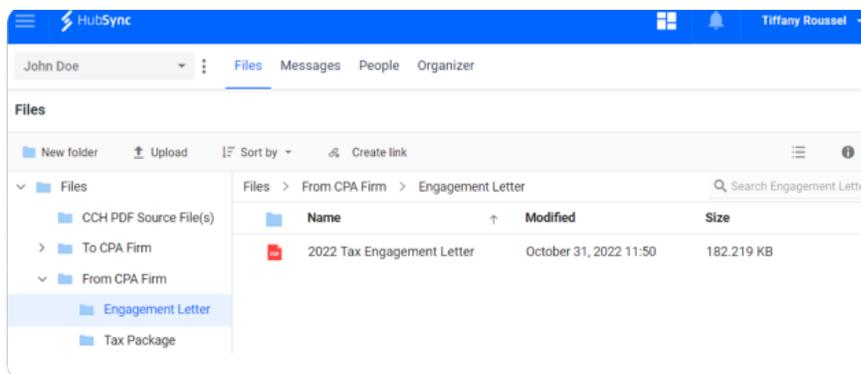
Our Delivery and Break Up functionality literally automates the break up of the tax return into its distinct pieces – Federal, State, Estimated Payments, 8879 – and then nicely delivers custom, broken up documents so your clients can have their different pieces delivered into the portal, with easy ability to download it as needed.

And for internal delivery, firms typically break up returns logically and what used to take 20 min/document now **takes just seconds**. Other benefits include:

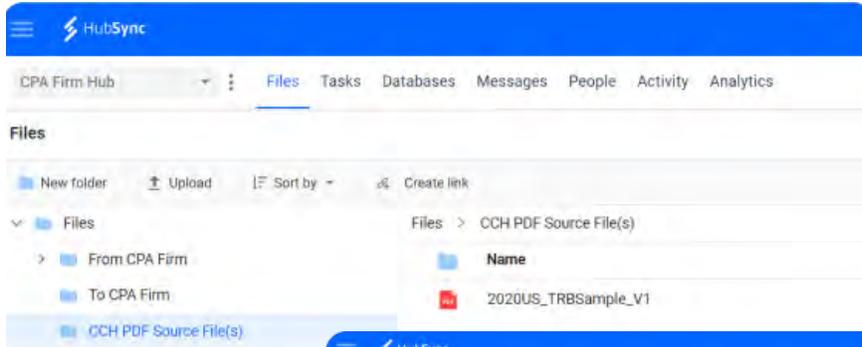
- ⚡ Removing unwanted pages.
- ⚡ Reorganizing and splitting documents per requirements specific to your firm.
- ⚡ A simple drag and drop by the professional kicks off the process and the document is automatically processed and delivered to the client.

## It's as easy as 1-2-3-4-5

1. Easily access your document as we integrate with your tax software
2. The HubSync secure portal provides easy accessibility to share files (*Picture A*)
3. Break Up the Return/Document (*Picture B*)
4. Alert clients to any & all activity (*Picture C*)
5. Clients easily download their document from the HubSync secure portal (*Picture D*)

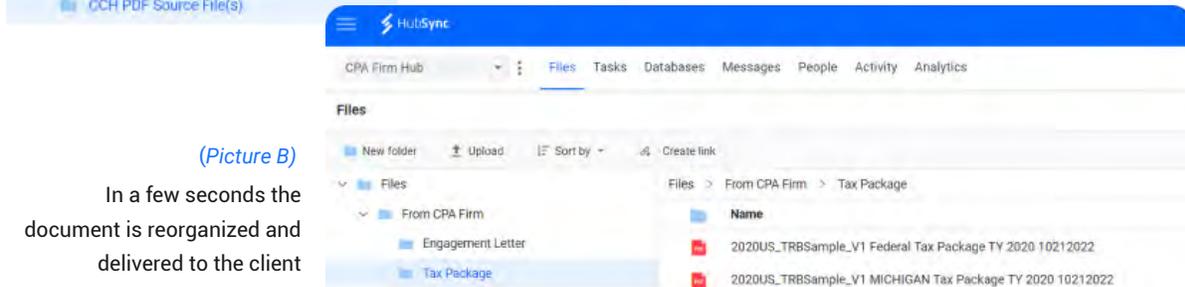


(Picture A)



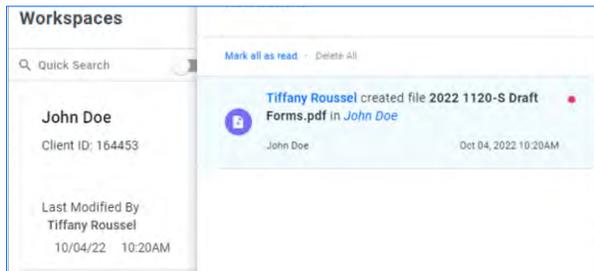
(Picture D)

- Upload the client copy here
- The Source Files folder is not visible to your client



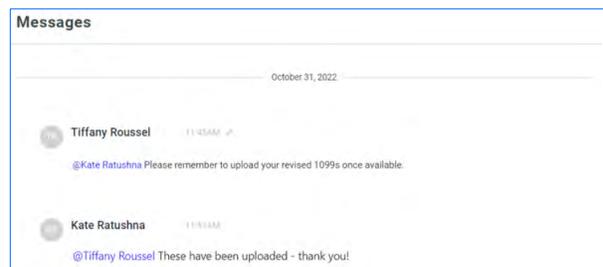
(Picture B)

In a few seconds the document is reorganized and delivered to the client



(Picture C)

Get immediate notifications of all activity in a workspace



Exchange messages within the portal instead of emails

## And there's more!

You can also use this feature to split the government copy for internal record keeping.

