Dashboards & Analytics

HubSync

HUBSYNC DASHBOARDS

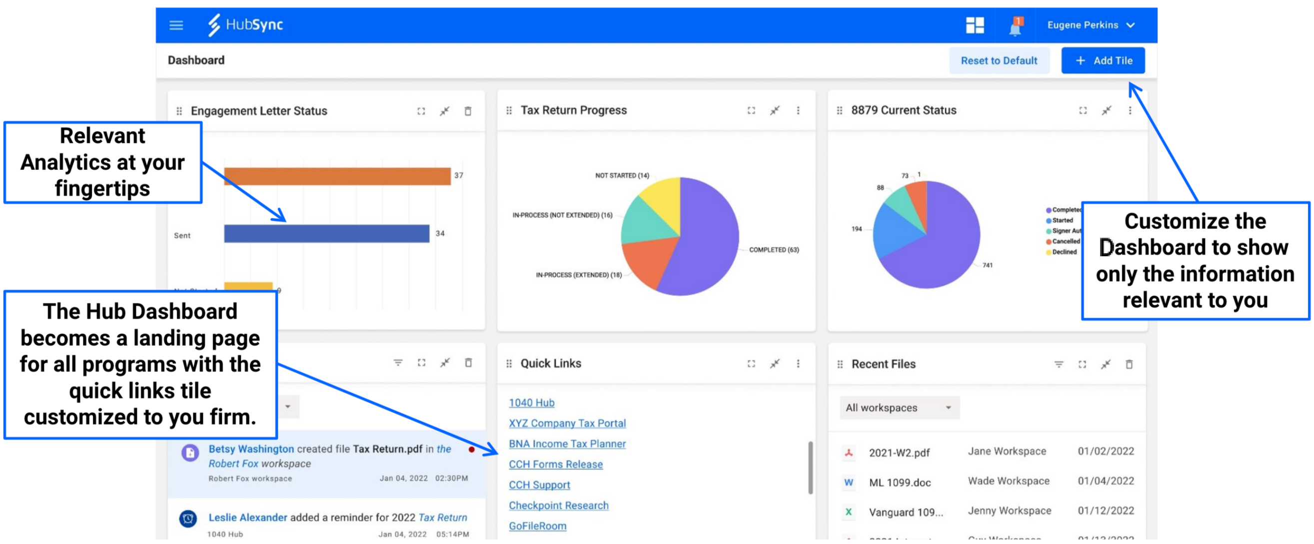
HubSync provides a dashboard of customized analytics for your firm. Your custom dashboards are made up of widgets and are integrated with HubSync data and other products used by CPA firms.

HubSync Dashboards empower users to decide, and act based on real-time data.

- Intuitive widgets
- Granular permissions
- Countless visualizations of business intelligence data
- Connections to multiple platforms
- Ability to view and export underlying data
- Multi-level drilldowns
- Easy-to-use
- Custom dashboards to suit reporting needs
- Geographic views by Office, Partner, Client
- Combinations of Charts & Graphs

If you can dream it, we can build it. **SO MANY WIDGETS AVAILABLE!**

- Bar Charts
- Column Charts
- Stacked Bar Charts
- Stacked Column Charts
- Area Charts
- Stacked Area Charts
- Radar Polar Charts
- Maps
- Grids
- Pivot Grids
- Tree Maps
- Heat Maps
- KPI Cards
- Number Cards
- Radial Gauges
- Pie Charts
- Doughnut Charts
- Pyramid Charts
- Funnel Charts
- Line Charts
- Spline Area Charts
- Combination Charts
- List Boxes
- Combo Boxes
- Range Navigators
- Range Sliders
- Date Pickers
- Period over Period



Dashboards & Analytics

HubSync

HubSync connects **3RD PARTY DATA SOURCES**

A wide variety of 3rd party data sources are also supported ranging from files and databases to REST API sources. We work with our clients closely to determine integration needs.

Here are a few examples of data sources we have connections to. Want to see a platform not listed, simply ask!

- CCH Axcess Tax
- CCH Prosystems fx Scan
- CCH Axcess Workflow
- CCH Axcess Electronic Filing Status
- CCH eSign
- Thomson Reuters OneSource
- IRIS Practice Engine
- Thomson Reuters Checkpoint
- Thomson Reuters Go System Tax RS
- Thomson Reuters Go File Room
- Thomson Reuters FirmFlow
- Salesforce
- IRIS Star

Most commonly used **DASHBOARDS** include:

Tax Return Tracking

Monitor the status of your tax returns across offices, by partner, and by status.

eSign (8879) Tracking

Monitor the status of your electronically delivered 8879s by offices, by partner, and by status.

Electronic Filing Status Tracking

Track status of your uploaded and released returns to taxing authorities by return type, office, status, and taxing authority.

Engagement Letter Tracking

Tracking the status of your electronically delivered engagement letters by office, partner, and by status.

Usage and Activity Tracking

Monitor and review activity in HubSync modules (e.g., Files Uploaded and Modified) for both your internal and external users.

Organizer Activity and Status Tracking

Monitor and review activity within Tax Organizers delivered to your clients (e.g., progress, % completed, # of files uploaded compared to total requested).

Indirect Tax Analysis

View liability across state, state filing threshold indicators, notices by state, % change from the prior period, track liability over time by state, county, or locality.

277 S Washington St. Suite 210
Alexandria, VA 22314

www.hubsync.com

HubSync