HubSync Portal Registration

CRI
CARR
RIGGS &
INGRAM

CPAs and Advisors

CRIcpa.com

Invitation email

Example of the invitation email to create a password for portal.

Please follow on screen prompts to create your secure account.

CRI CPA <no-reply@hubsync.com>
To: You

Sun 1/14/2024 8:01 PM

Create Password

Hi

Click on the following link to setup your password.

Create Password

Ignore this email if you did not request a password reset. To keep the account secure, do not forward this email.

This is an automatically generated email. Please do not reply.
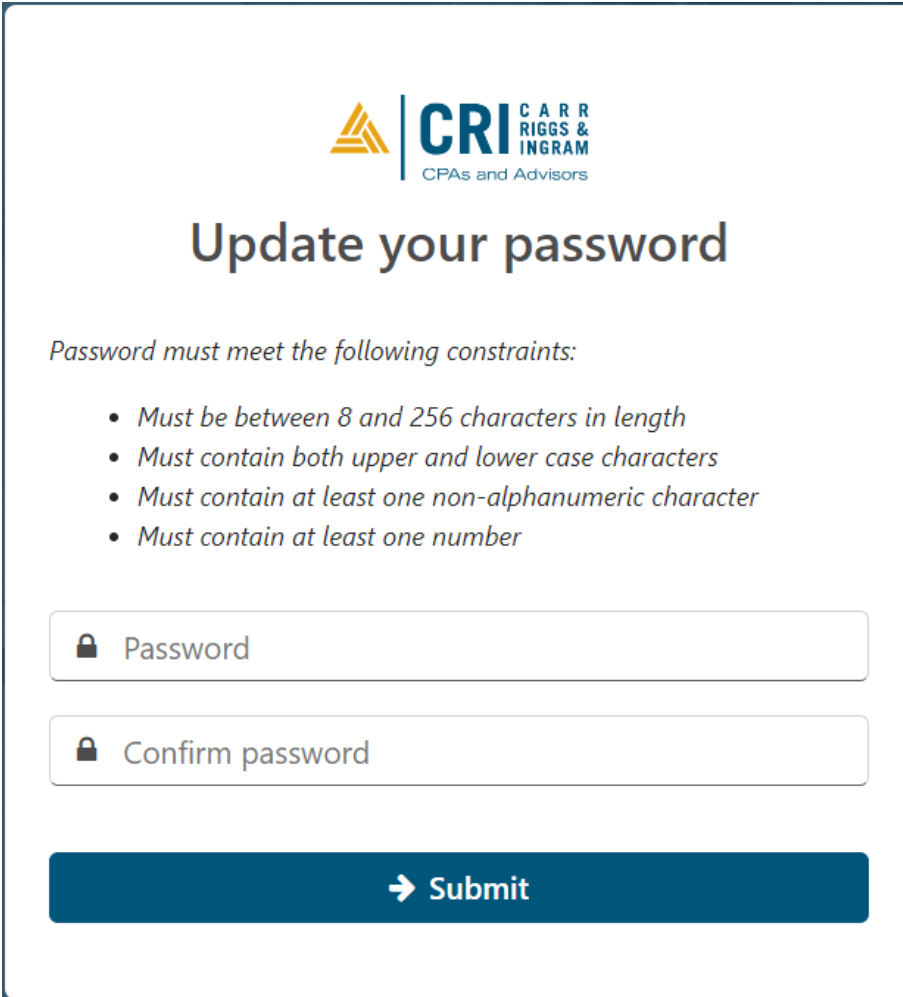
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Powered by

Invitation email – create password

Your portal username is your email address at which you received the invitation.

To finish creating your account, enter a password that meets all of the requirements listed.
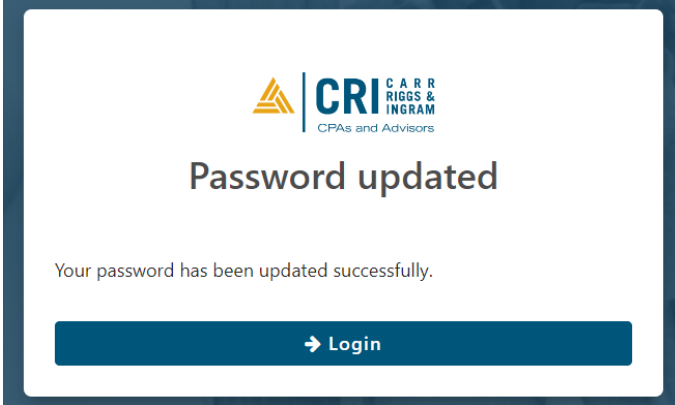
Click "Submit"

Complete Registration
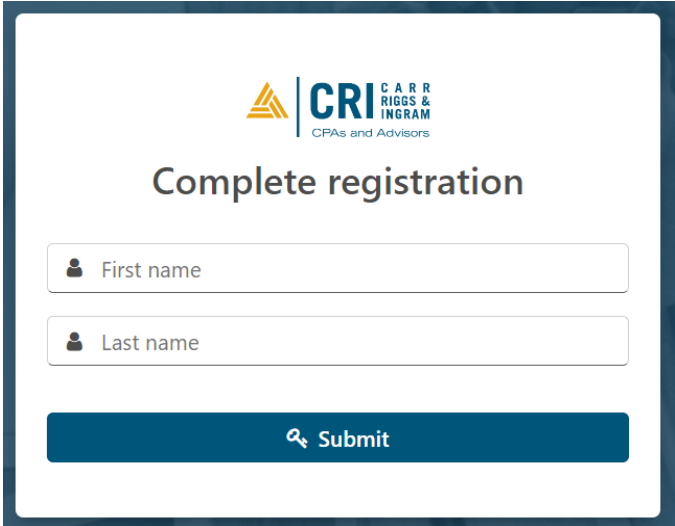
Confirmation of password updated will be displayed on the next screen with request to Login.

Next screen will ask for your First and Last Names

Enable two-factor authentication

For your security, two-factor authentication must be established.

Select a method from the drop-down menu – Email or SMS

Click on Send a one-time code and verification code is received, input in the box provided and click "Enable".

Two-factor authentication recovery codes

System will produce ten recovery codes for your safekeeping in the event you lose your device.

Please store these in a safe location.

Click "Done" to complete your registration and access your client portal.

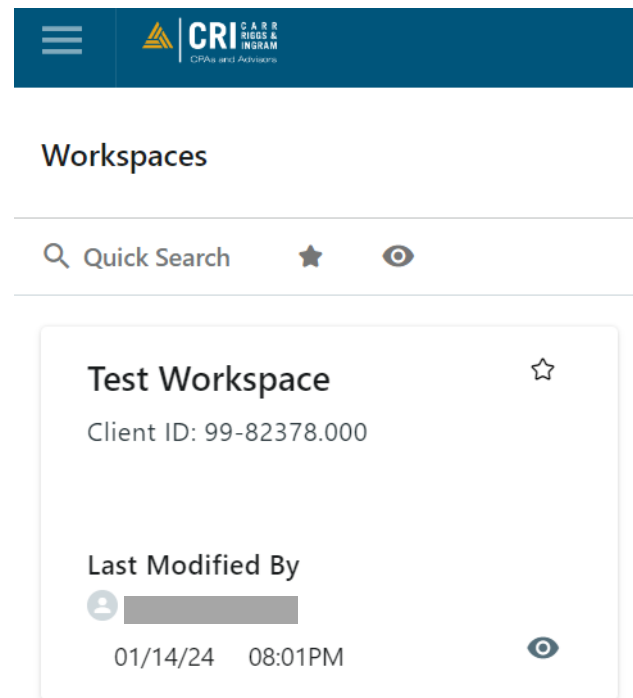Note that you will be asked to accept CRI's Acceptable Use Terms and Policy.

Example of Portal

Your workspace will be displayed as the one shown on this page.

Please note that if your email address is associated with multiple client relationships with CRI, and you get invited to all of those with the same email address, you will see all of your workspaces in one place.

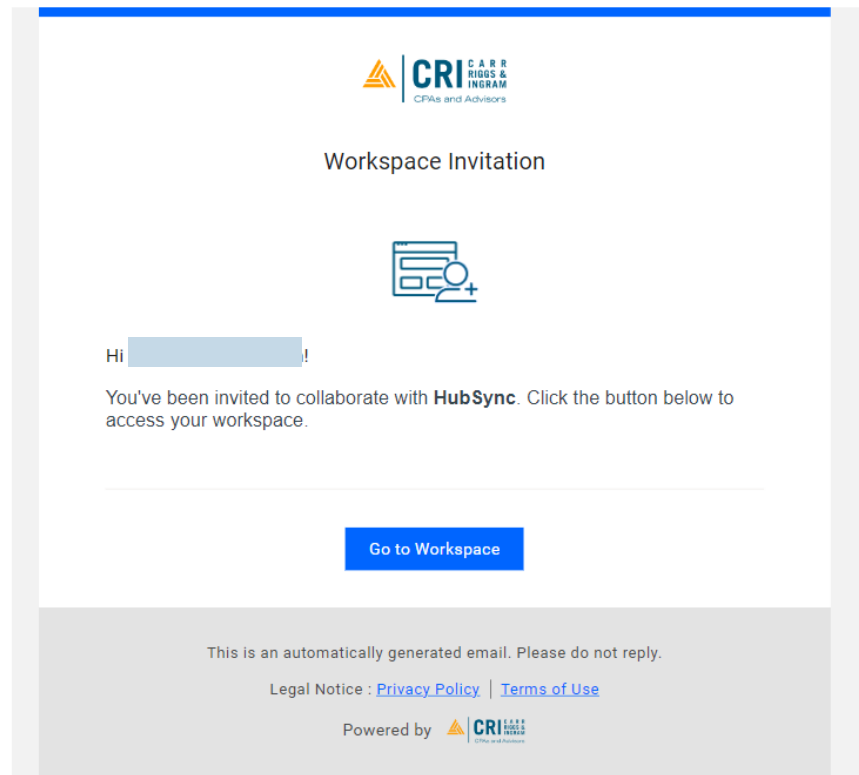Examples: taxpayer with children or associated entities group.

HubSync workspace invitation

- Example of workspace invitation email is displayed on this page.

- Please follow on screen prompts to create your secure account.

- Existing registered users will need to login to view all HubSync workspaces they've been invited to.

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