

# HubSync Portal Registration



**CRI** CARR  
RIGGS &  
INGRAM

CPAs and Advisors

[CRIcpa.com](http://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 [REDACTED]

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 CRI CARR RIGGS & INGRAM  
CPAs and Advisors

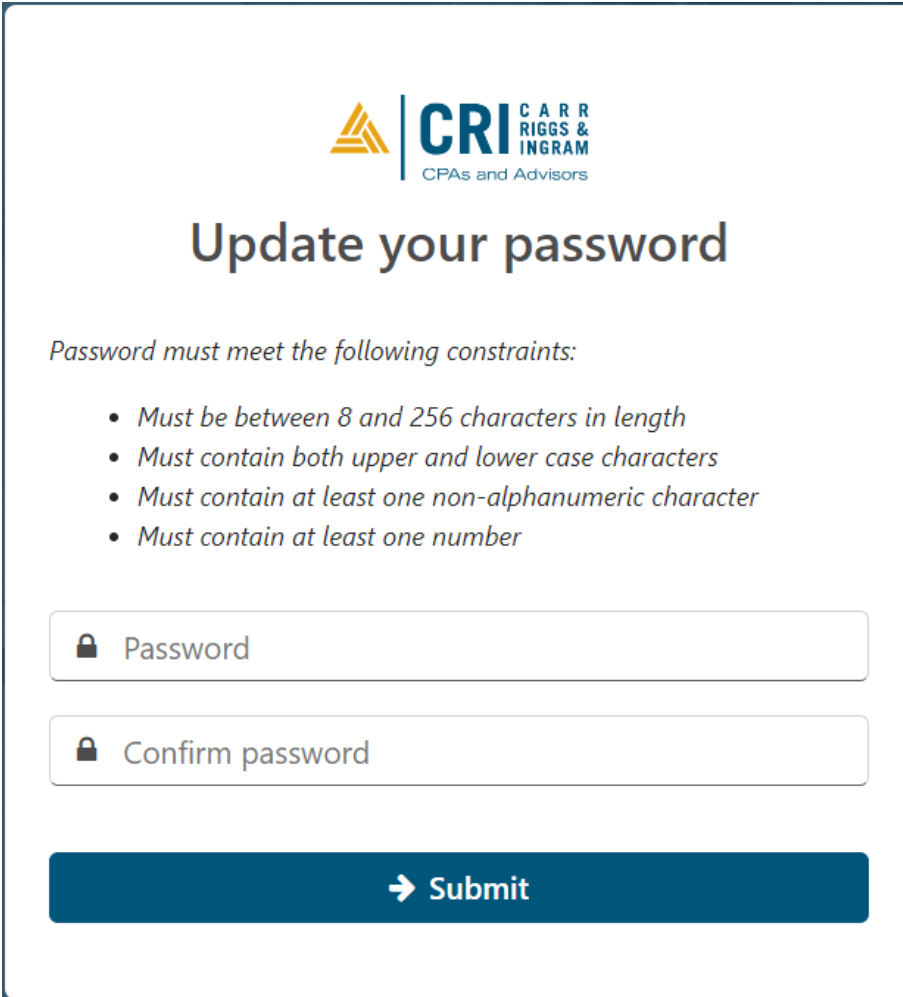
# Invitation email – create password

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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"




The screenshot shows a web form for updating a password. At the top right is the CRI logo, which consists of a stylized triangle icon followed by the text 'CRI CARR RIGGS & INGRAM CPAs and Advisors'. Below the logo is the heading 'Update your password'. Underneath the heading is a note: 'Password must meet the following constraints:'. This is followed by a bulleted list of four requirements: 'Must be between 8 and 256 characters in length', 'Must contain both upper and lower case characters', 'Must contain at least one non-alphanumeric character', and 'Must contain at least one number'. Below the list are two input fields, each with a lock icon on the left and the text 'Password' and 'Confirm password' respectively. At the bottom of the form is a dark blue button with a white right-pointing arrow and the text 'Submit'.


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## Update your password

*Password must meet the following constraints:*

- *Must be between 8 and 256 characters in length*
- *Must contain both upper and lower case characters*
- *Must contain at least one non-alphanumeric character*
- *Must contain at least one number*

 Password

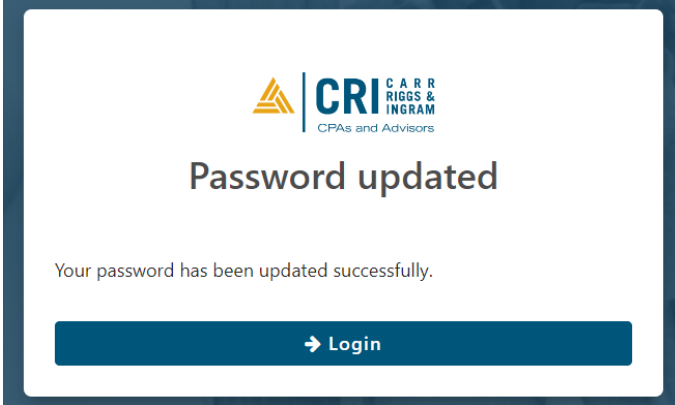
 Confirm password

 → Submit

# Complete Registration

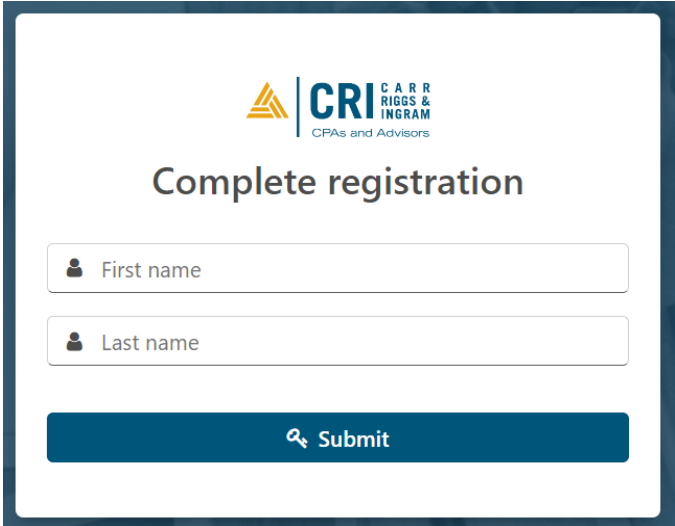
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Confirmation of password updated will be displayed on the next screen with request to Login.



The screenshot shows a confirmation screen for a password update. At the top center is the logo for CARR RIGGS & INGRAM CPAs and Advisors, consisting of a stylized yellow triangle icon followed by the text 'CARR RIGGS & INGRAM' and 'CPAs and Advisors' below it. Below the logo, the heading 'Password updated' is displayed in a large, bold, dark blue font. Underneath the heading, the text 'Your password has been updated successfully.' is shown in a smaller, dark blue font. At the bottom of the screen is a dark blue button with a white right-pointing arrow and the text 'Login' in white.

Next screen will ask for your First and Last Names





The screenshot shows a 'Complete registration' screen. At the top center is the logo for CARR RIGGS & INGRAM CPAs and Advisors, identical to the previous screen. Below the logo, the heading 'Complete registration' is displayed in a large, bold, dark blue font. Underneath the heading are two input fields, each with a small person icon on the left. The first field is labeled 'First name' and the second is labeled 'Last name'. At the bottom of the screen is a dark blue button with a white magnifying glass icon and the text 'Submit' in white.


# 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".

 You must configure two-factor in order to continue. 




## Enable two-factor

Select a method \*


Email 

To enable two-factor using email, click the button to send a one-time use code. Once you receive the code, enter it in the form below.

Email:

 Send a one-time code

Verification code \*

 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.

 Two-factor authentication has been enabled 



**Enable two-factor**

Because this is the first time you have enabled two-factor, we have generated you 10 recovery codes. These codes will not be shown again, so record them right now and store them in a safe place. These codes can be used to complete a two-factor login if you lose your device, and they can be used to disable two-factor authentication as well.

Please store this in a safe location

TKB23-PK4KN	LJ5BZ-P7JC4	5H6JQ-CNG23
GL3Q7-DMJV4	F95H3-HPRLJ	LCSDf-H9FJ7
6ZZY8-M5H73	3B2BK-HGZDW	LYBXT-P3Q4G
	29GCH-2ZBVK	

Once you have recorded the codes, click Done to return to HubSync.

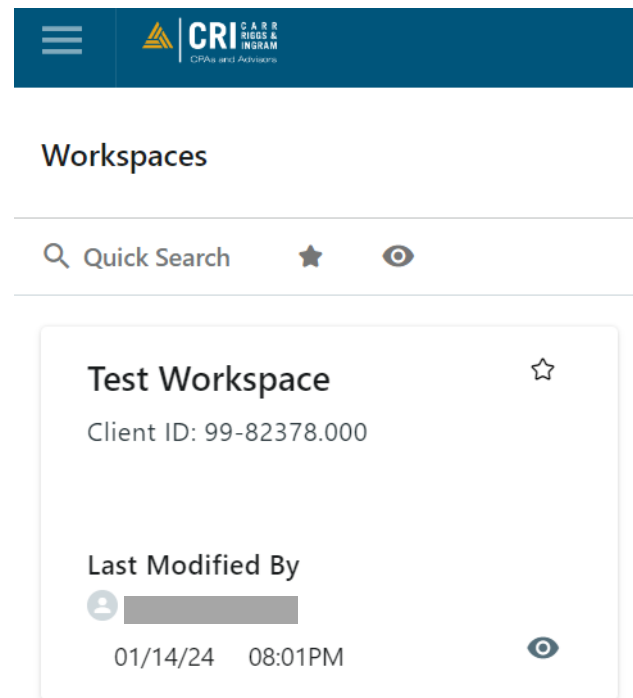
[→ Done](#)

# 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.

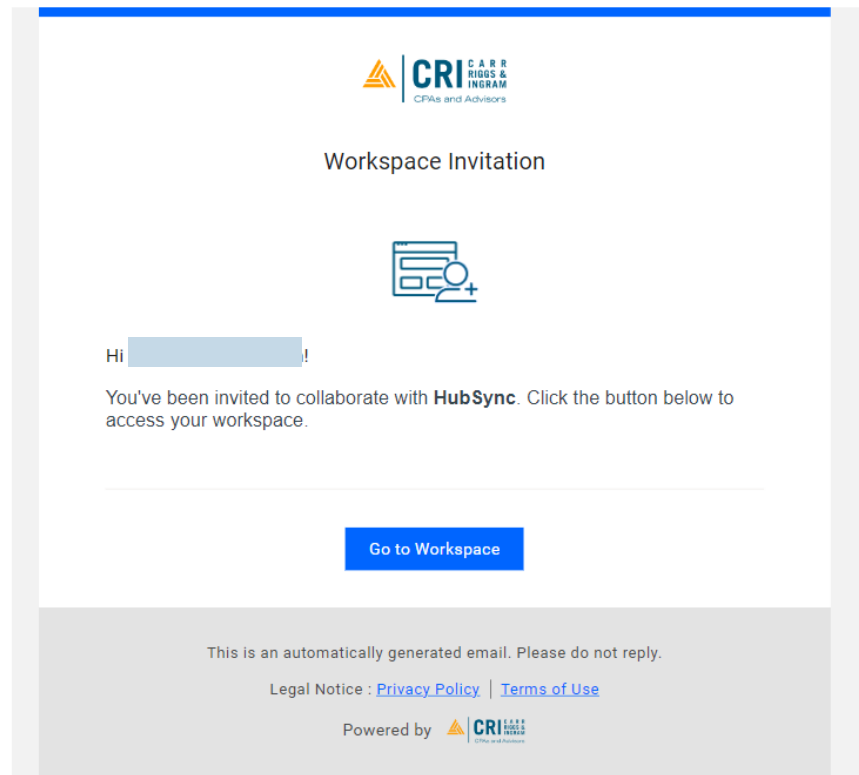


The screenshot shows the top navigation bar of the CRI portal, featuring a hamburger menu icon, the CRI logo, and the text "CARR RIGGS & INGRAM CPAs and Advisors". Below the navigation bar is a "Workspaces" section. A search bar labeled "Quick Search" is present, along with a star icon and an eye icon. The main content area displays a single workspace card for "Test Workspace". The card includes the text "Client ID: 99-82378.000", a "Last Modified By" field with a greyed-out name and a user icon, and a timestamp "01/14/24 08:01PM". A star icon is located in the top right corner of the card, and an eye icon is in the bottom right corner.

# 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.

H HubSync <no-reply@hubsync.com>  
To: You





# Follow CRI on Social Media

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**CONNECT @CRICpa**

