



HubSync Enhances Tax Preparation with Docubee API

Overview

Established by a group of veteran tax professionals seeking to modernize accounting technology, HubSync provides a SaaS platform that digitizes, unifies, and automates the tax preparation process to improve both the client experience and CPA productivity. By streamlining the collection of tax information, enhancing communication, and reducing complexity through one secure platform, HubSync empowers tax professionals to focus more on advising clients rather than wrangling disparate data and dealing with cumbersome manual processes.



Challenges

Building the software that could automate those processes from end to end required a deep level of understanding about how tax information needed to be gathered and moved through a consolidated workflow. Thanks to the HubSync team's experience with the tax industry's existing technology, they had little difficulty designing an all-in-one digital, customer-centric platform that could transform the way CPAs manage the returns process. The principal challenge facing the small development team, however, was building the functionality that would allow HubSync to consolidate tax information from multiple sources into a single document as part of a conditional workflow.

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Challenges (cont.)

"It takes a vast amount of information," said HubSync COO Paul Madarasz. "You're capturing details about the taxpayer, details about what they've made, and conditional statements that allow you to collect additional information based upon what's happened to them in a particular year or tax timeframe."

Rather than spending valuable development time and resources building that functionality from scratch, Madarasz recognized that they could get to market much faster by integrating an existing, proven workflow solution into the platform. "We felt that there were products in the market that could do this and that we didn't need to go out and create this ourselves, but rather partner with a firm that would allow us to white label and integrate with our platform."

After evaluating several options, the company chose to use Docubee based on the maturity of the Accusoft brand, which has been in business for three decades. "We view these as long-term partnerships," Madarasz explained. "Outside of just the product, the most important piece by far was the maturity of the organization."

Despite the longevity of its parent company, Docubee shared the same market disrupting mentality as HubSync, which made the platforms an ideal match. Unlike many competing document assembly and workflow products, Docubee was designed to be an end-to-end platform that's entirely insulated from external dependencies. In addition to being fully HIPAA, FERPA, and SOC 2 compliant, Docubee doesn't require any additional plug-ins, licensing, or ongoing consulting engagements. Given HubSync's high volume usage needs, an all-in-one document workflow platform offered the flexibility needed to become a true disruptor in the tax preparation industry.

Results

With Docubee in place, the HubSync team got to work utilizing the platform's API to incorporate its functionality into their existing tax software. First, the Docubee platform was integrated into HubSync's backend database to gather information from a variety of sources, including forms submitted by customers and various tax return applications. The next step involved creating a workspace that would allow users to track and organize tasks in real time to facilitate better collaboration, transparency, and efficiency. Docubee's versatile conditional workflow capabilities allowed the HubSync platform to seamlessly direct documents to the appropriate destinations for review and approval.

The integration process proved to be quite smooth, partly because the Docubee team worked closely with HubSync to stretch the platform's functionality and add custom features to meet specific tax

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Results (cont.)

processing needs. Having an experienced, responsive team just a phone call away proved to be a huge benefit throughout the integration process, no matter what the situation happened to be. “We haven’t had any trouble working with them at all,” said Madarasz. “When there’s an issue, all of us show up, all of them show up, and we all solve the problem together.”

After such a successful implementation, the HubSync team is continuing to look at ways they could integrate additional functionality from the Docubee platform. Thanks to Docubee’s white labeling features and APIs, they can easily incorporate new features as needed to expand their overall capabilities without committing a great deal of development resources. With the tax preparation industry undergoing a sweeping digital transformation, HubSync has the right partner in place to disrupt the status quo and meet the emerging needs of tax professionals so they can advise their clients more effectively.



We really like the people a lot and they brought a tremendous amount of value to the table.

— DR. KAREN ACREE, DIRECTOR, APPLICATION AND TECHNOLOGY LEARNING SERVICES



About HubSync

HubSync offers several radical technology solutions for the tax and accounting industry. Their fully automated, start-to-finish solution solves the pain points associated with the tax return process. Fully modularized, their new platform provides full connectivity for the tax preparer and their clients. HubSync's revolutionary new platform includes everything you and your clients need to file with ease. Visit www.hubsync.com to see an overview of all HubSync has to offer.

About Docubee

Docubee is an intelligent contract automation platform that lets businesses create, manage, sign, and track digital contracts in one secure platform. Docubee powers contracts by enabling users to gather vital customer data, create contracts using tools like generative AI or pre-built templates, and connect pieces of the process with dynamic workflows. Users can integrate Docubee with their existing site or platform via the API or connect to thousands of apps and CRMs using native and webhook-powered integrations. For more information, visit docubee.com.

